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ABSTRACT

This curriculum guide, dealing with competency-based cooperative office education in the State of Louisiana, consists of 10 chapters on program implementation and 12 instructional units. Covered in the first part of the guide are cooperative office education programs; coordination, program management, and student placement; legal responsibilities; advisory committees, public relations; classroom necessities; reports; student organizations; supplemental materials; and the evaluation process. Topics addressed in the instructional units include telephone techniques; word processing; human relations; securing and keeping job communication skills; financial records; business math and machines; typing; shorthand; office procedures; and specialized offices, such as banking, insurance, legal, and medical offices. (MN)

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STATE OF LOUISIANA

DEPARTMENT OF EDUCATION

REVISION
BULLETIN 1246

COMPETENCY-BASED
COOPERATIVE OFFICE EDUCATION

VOCATIONAL EDUCATION CURRICULUM GUIDE

Issued by

Office of Vocational Education

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FOREWORD

This curriculum guideline, Cooperative Office Education, was produced as a result of a project funded by the Louisiana State Department of Education to Nicholls State University of Louisiana. These units were developed with the assistance of Business Education teachers and coordinators throughout the state of Louisiana.

The instructional units of work included in this curriculum guide have been written to aid teachers in meeting the increasing and the changing needs of the students and of the job market. This guide lists specific objectives in terms of competencies that, when achieved, will enable the student to obtain employment.

J. Kelly Nix

J. KELLY NIX, STATE SUPERINTENDENT

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COOPERATIVE OFFICE EDUCATION

Cooperative Office Education (COE) is a cooperative work and training program for high school seniors who have completed the necessary prerequisites and are preparing for employment in office occupations. Through the cooperative efforts of the teacher-coordinator and the employer, the student receives academic and vocational instruction and practical, on-the-job training related to his/her individual job needs and career goals. Therefore, employment becomes an integral part of the educational program.

General Objectives

1. Enrich the instructional program to include current business practices and procedures and up-to-date technology.
2. Provide exploratory opportunities by offering career choices for students with varying interests and aptitudes.
3. Provide the student an opportunity to apply the skills and theories acquired in school and to bridge the gap from school to full-time employment.

Specific Objectives

1. Coordinate classroom instructional experience with practical work experience.
2. Provide an opportunity for the student to work with successful businessmen and women.
3. Develop and improve skills and techniques required by the local job market.
4. Stress the development of those personal traits, such as dependability, tact, poise, punctuality, etc., which are vital factors in job success and advancement.
5. Graduate a student who has had successful work experience that will contribute to his/her advancement in the business world.
6. Promote a closer relationship between the school and the business community through a joint effort to prepare students for entry-level jobs upon graduation from high school.

BENEFITS OF THE PROGRAM

The basic purpose of the Cooperative Office Education program is to prepare students for gainful employment in careers of their choice. COE can make a substantial contribution toward solving employment problems for students. The program allows students to make a gradual transition from school to work while under the professional guidance of experienced teacher-coordinators and on-the-job supervisors.

Benefits to Students

The students have an opportunity to:

1. develop a sense of responsibility and dependability.
2. acquire an understanding of the employment opportunities available to them and the responsibilities required by these opportunities through on-the-job training.
3. develop the attitudes, skills, and related knowledge necessary for success in his/her career objective.
4. develop those work habits which are necessary for job success.
5. acquire practical experience which can lead to full-time employment upon graduation.
6. value the importance of getting along with others in the work environment.
7. make practical application of those skills and abilities acquired in the classroom.
8. gain the work experience, which will enhance his/her chances for success and advancement when seeking full-time employment.
9. begin career training before assuming total personal financial responsibility.

Benefits to the School

The school benefits because Cooperative Office Education:

1. uses the facilities and technology of cooperating businesses to broaden the vocational curriculum.
2. provides a means of evaluating the effectiveness of the business education curriculum.

3. enables the school to update course content and methods and to keep abreast of current office procedures and technology.
4. utilizes the facilities and equipment of cooperating employers as a laboratory for practical training thus reducing expenditures for equipment.
5. develops a working relationship between the school and the community.
6. meets the vocational needs of students with varying abilities and capacities.
7. provides effective career training not found within the limits of a classroom setting.
8. provides up-to-date information.

Benefits to the Employers

Employers benefit as Cooperative Office Education:

1. decreases training costs for entry-level positions as the student with work experience can make an easier transition from the classroom to full-time employment.
2. provides motivated part-time workers who are receptive to instruction.
3. provides a better part-time student applicant and encourages him/her to continue working for the employer from whom he/she received training.
4. provides a steady source of experienced workers for full-time employment in entry-level positions, thus reducing employment problems.
5. assists in the instruction and guidance of the student during his/her initial job experience.
6. screens the prospective student worker prior to employment.
7. improves communication between educators and employers.
8. enhances the firm's public image in the local community.
9. provides an opportunity for the employer to participate in planning and executing the training program for the student worker.

Benefits to the Community

The community benefits as Cooperative Office Education:

1. reduces the number of unemployed and unemployable youth in the local community and provides a continuous source of trained entry-level office workers.
2. encourages a greater number of young people to remain in school until they become employable, thus decreasing the dropout rate.
3. provides opportunities for the community and school to work together in the educational process.

THE TEACHER-COORDINATOR

The teacher-coordinator of the Cooperative Office Education program is the key to the success of the program. His/her primary goal is the preparation of students to enter and advance in their careers. The teacher-coordinator's involvement with students, parents, other school personnel, and employers will cast him/her in a variety of roles.

The Teaching Role. As a teacher, the teacher-coordinator directs the learning program that will allow the student to develop the skills, attitudes, and related learnings necessary for success in the business world.

The Coordination Role. As the coordinator of the program, he/she must secure training stations, place students, evaluate student progress, integrate classroom theory with practical application, and serve as advisor to the student organization.

The Counseling Role. As counselor, the teacher-coordinator must provide career guidance for the student trainees.

The Public Relations Role. The teacher-coordinator must promote good public relations in the classroom, in the school environment, and in the business community.

The Administrative Role. The teacher-coordinator will be involved to varying degrees with planning, budgeting, reporting, evaluating and supervising functions.

Certification

The teacher-coordinator of the Cooperative Office Education program must meet the requirements as outlined in Bulletin 746, Louisiana Standards for State Certification of School Personnel. In addition, he/she must comply with the "Minimum Standards for State Approval in Reimbursed Programs of Vocational Education."

Professional Organizations

Professional organizations allow members to share their knowledge and achieve personal and professional growth. As a professional educator, the teacher-coordinator should be active in the general education organizations as well as the vocational organizations. The teacher-coordinator in Louisiana is urged to join and participate in the following vocational organizations:

American Vocational Association (AVA). At the national level the American Vocational Association is an organization promoting all areas of vocational education. The affiliate for the business education division is Classroom Educators for Business and Office Education (CEBOE).

2020 North 14th Street
Arlington, VA 22201

Louisiana Vocational Association (LVA). The Louisiana Vocational Association is the state affiliate of AVA.

5845 South Pollard Parkway
Baton Rouge, LA 70808

National Business Education Association (NBEA). Membership in NBEA includes membership in the regional association, Southern Business Education Association (SBEA).

1914 Association Drive
Reston, VA 22091

Louisiana Association of Business Educators (LABE). The Louisiana Association of Business Educators is the business education section of LVA.

c/o Business Education Section
State Department of Education
Post Office Box 44064
Baton Rouge, LA 70804

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PROGRAM MANAGEMENT

Coordination is an on-going process engaged in by the teacher-coordinator and includes the following activities:

Recruiting students
Selecting students
Placing students
Recruiting training stations
Selecting training stations
Developing training agreements
Developing training plans
Coordination visits
Evaluating on-the-job training
Evaluating students' classroom activities
Public relations
Records management

A brief checklist for each activity follows with more complete lists in succeeding sections.

Recruiting Students

1. Ask counselors to publicize program among the junior students during registration for senior year.
2. Ask other business education, math, and English teachers to talk with their vocationally-inclined students about the COE program.
3. Display posters.
4. Have interested students pick up and complete application forms.

Selecting Students

1. Review applications including age, attendance record, disciplinary record, career intent.
2. Review applicants with appropriate school personnel.
3. Interview prospective COE students.
4. Select the students based on the above findings.

Placing Students

1. Assess skills and abilities of individual applicants.
2. Contact local businesses for available jobs.
3. Determine skills and abilities needed on job and number of students to be interviewed.
4. Schedule job interviews.
5. Follow up on job interviews.

Recruiting and Selecting Training Stations

1. Contact employers who have previously participated in program.
2. Contact prospective new employers.
3. Solicit help from members of advisory committee in recruiting training stations.
4. Interview appropriate personnel at each training station to determine duties involved, hours per day and per week, and length of employment period.
5. Be sure prospective employers understand child labor laws and the rules and regulations governing the COE program.

Developing Training Agreements

1. Review training agreements with students, parents, administrators and employers.
2. Have training agreement signed by student, parent, employer, administrator, and teacher-coordinator.

Developing Training Plans

1. Review training plan with employer and ask him/her to list all the tasks for which the student will be trained.

2. Have training plan signed by student, parent, employer, and teacher-coordinator and furnish each party with a copy.

3. Periodically review the training plan during evaluation of student's progress.

Coordinating Visits

Visits should promote effectiveness and enhance efficiency. You should:

1. make an appointment for the visit at a time convenient to training supervisor.

2. be sure the purpose is clearly stated.

3. not interrupt the student-trainee's work unless the supervisor asks that the student participate in the interview.

4. record a summary of each visit.

5. be sure confidentiality of information is maintained.

6. conduct a follow-up interview with the student-trainee to advise him/her of strengths and/or weaknesses.

Evaluating On-The-Job Training

1. Review points on evaluation form with employer.

2. Set deadline for completion of form.

3. Arrange for form to be returned to teacher-coordinator.

4. Review completed form with student pointing out strengths and weaknesses and making suggestions for improvement.

Evaluating Student's Classroom Activities

1. Write evaluation of student's performance on classroom assignments.

2. Evaluate student's skill performance on appropriate office machines.

3. Evaluate student's attendance, punctuality and other pertinent characteristics.

Public Relations

1. Publicize the program in school.
2. Publicize the program in the business community through the news media.
3. Make presentations to professional and civic groups when appropriate.
4. Prepare bulletin on program for distribution to students, parents, and employers.
5. Make presentation about program to parent-backer organization.
6. Publish and distribute COE newsletter.
7. Encourage your advisory committee to promote COE program whenever and wherever possible.

Records Management

In order to have available all of the information to be reported for this federally funded program, it will be necessary to maintain accurate student records. It is recommended that a folder be maintained for each student to include the following documentation:

1. Classroom performance records
2. Application and interview notes
3. Record of interviews
4. Training agreement
5. Training plan
6. Employer evaluation forms
7. Weekly earnings report
8. Attendance and work reports

CALENDAR OF COORDINATION ACTIVITIES

August

1. Record telephone calls, activities, coordination calls, and mileage to be used in required reports and other records.
2. Contact students currently enrolled in COE program to determine availability for work and review career interest.
3. Contact other interested students to fill any vacancies left by students not returning to school and/or the COE program.
4. Create coordination file folders for students.
5. Review cumulative records of students to determine that all graduation requirements will have been met by the end of the school year.
6. Contact counselor to change student schedule to fit work schedule.
7. Schedule orientation with both students and parents.
8. Follow up on last year's COE students to determine current employment status.
9. Recruit new training stations and inform employers of COE rules and regulations.
10. Seek the aid of the advisory committee members and civic and professional organizations in locating new training stations.
11. Arrange interviews for students as jobs become available.
12. Attend meetings of state vocational education association and local coordinators' meetings.
13. Prepare article on COE for first edition of school newspaper and for "back-to-school" issue of local newspaper.
14. Organize advisory committee for coming year.
15. Review child labor laws and any others affecting the COE program.
16. Prepare a tentative schedule of activities for youth club; publicize planned activities.
17. Confirm contacts with newspaper, radio, and television personnel.

September

1. Continue placement of students and adjust to fit work schedules.
2. Plan and present an orientation program for new students and for those students who did not attend the summer orientation session.
3. Review training agreements with students, parents, and employers and obtain signatures.
4. Visit training stations and develop a training plan for each student. Obtain appropriate signatures.
5. Build public relations activities around school events.
6. Call meeting of advisory committee. Prepare the agenda and minutes of the meeting.
7. Call meeting of youth organization. Elect officers and assist in planning activities for the year. Encourage students to begin preparation for district and state contests.
8. Make sure school calendar includes dates for the group's functions.
9. Prepare and file enrollment report with State Department of Education.
10. Plan and conduct fund-raising project(s).
11. Keep a daily log of coordination activities, training station visits, telephone calls, and mileage.

October - November - December

1. Continue visiting training stations and developing a training plan for each student.
2. Periodically evaluate each training station.
3. Evaluate student's progress on the job by conferring with employer. Determine student's grade for first grading period.
4. At the all-school open house, conduct a program for parents of COE students.
5. Attend business education department meetings and solicit help from other business education teachers in developing a strong COE program.

6. Continue to maintain daily log of coordination activities.

7. Plan and conduct media programs promoting benefits of COE program.

8. Prepare displays promoting COE program.

9. Conduct individual conferences with students regarding their performance on the job, any problems encountered, classroom performance, and to offer suggestions and encouragement.

10. Maintain a "needs list" for supplies and equipment.

11. Have an open house for students, parents, and employers during school time to show off classroom. This can be done effectively prior to a school holiday, such as Thanksgiving, Christmas, etc.

12. Follow recommendations presented in first advisory committee meeting.

13. Plan additional meetings of advisory committee as needed.

14. Provide guidance and supervision during youth club meetings. Audit money and requisitions. Continue to encourage students to prepare for district and state contests.

15. Attend professional meetings--LABE, etc.

16. Invite local, state, and federal officials to observe the program.

January

1. Evaluate student's progress on the job by conferring with employer. Determine student's grade for second grading period.

2. Seek help of counselor in making second semester schedule adjustments.

3. Help students who are applying for scholarships and grants.

4. Conduct a follow-up study of previous graduates.

5. Update promotional brochures and course descriptions.

6. Begin preparation for employer appreciation function.

7. Interview students individually concerning grades and on-the-job progress.

8. Order examination copies of current teaching materials.

9. Plan activities for National Vocational Education Week.

10. Plan activities for FBLA/PBL Week.

11. Continue to maintain daily log of coordination activities.

February - March - April

1. Recruit students for next year's COE program.
    a. Have present COE students talk to business education classes and relate successful COE experiences to prospective COE students.
    b. Remind counselors to encourage vocationally-inclined students to apply for COE program.
    c. Put up posters and bulletin board displays in school.
    d. Distribute application blanks and other information to prospective students.
    e. Ask faculty to recommend prospective students.
    f. Collect needed information about prospective students.
    g. Interview and counsel prospective students.
    h. Choose students for next year's program.
    i. Notify students regarding acceptance in COE for coming year. Assist them with registration.
    j. Notify parents of new COE students and furnish them with information about the program.

2. Continue visiting training stations. Review with supervisor the training plan for each student. Determine student's progress on the job and determine student's grade for third grading period.

3. Select students who are to receive awards.

4. Plan activities for National Secretaries Week (April); be sure to include school secretaries.

5. Implement recommendations of advisory committee and call meetings as needed.

6. Carry out activities planned for FBLA/PBL Week.

7. Attend FBLA/PBL District and State Leadership Conferences.

8. Order textbooks, workbooks, practice sets, and other supplies for coming school year.

9. If funds are available, request new equipment for classroom instruction.

10. Continue to maintain daily log of coordination activities.

Late April - May

1. Conduct employer appreciation function.

2. Complete final on-the-job evaluation for each student. Determine student's grade for final grade reporting period.

3. Assist graduating COE students with college or employment planning.

4. Complete and submit vocational education reports as required by the State Department of Education.

5. Have an end-of-year meeting of the advisory committee to assess effectiveness of recommendations and to evaluate activities.

6. Prepare for National FBLA/PBL Leadership Conference.

7. Complete final audit of club funds and submit to proper authority.

8. Present awards to selected COE students at the school's Honors Day program.

9. Continue to keep daily log of coordination activities.

June

1. Send a thank-you letter to each employer expressing appreciation for participation in the COE program.

2. Update files for ending school term.

3. Conduct a summer orientation for new COE students to apprise them of rules and regulations governing COE program at local, parish, and state levels and to prepare them for job interviews.

4. Conduct an orientation activity for parents of new COE students.

5. Confirm existing training stations.

6. Enlist new training stations.

7. Begin placement of students for coming school year.
8. Organize file folders for new students.
9. Prepare training agreement for new students.
10. Attend professional meetings.

Ongoing Activities

1. Keep informed of new office practices, procedures and other developments by reading professional magazines and other literature.
2. Update supplementary materials in classroom.
3. Enlist the aid of the school librarian in acquiring reference books and supplementary materials.
4. Prepare articles for professional publications.
5. Assist in preparation of local COE newsletter.
6. Provide occupational information to counselors and administrators.
7. Participate in curriculum revision as the opportunity arises.
8. Update teaching methods and procedures.
9. Revise instructional units as needed to keep abreast of new procedures and technology.
10. Keep classroom bulletin boards up-to-date.
11. Observe programs at other schools when possible.
12. Be actively involved in local, state, and national professional organizations.
13. Participate in in-service activities for professional growth and development.
14. Make presentations to professional and civic organizations when requested.
15. Serve students by example in character, dress, work habits, and ethics.
16. Establish and maintain open lines of communication with other teachers, administrators, and staff personnel at local and state level.

17. Keep school administration informed of outstanding accomplishments by COE students in the classroom and on the job.

18. Participate in exchange visits for teachers, business and industry.

INITIATION OF NEW PROGRAM

A new COE program should be initiated only after extensive planning has begun at least a year in advance. Steps in beginning a new program include the following:

1. Determine need and feasibility
2. Outline a tentative program
3. Present program proposal to administrators
4. Begin program operations

Determine Need and Feasibility

The idea for a COE program may be initiated by an interested business teacher, vocational supervisor, school administrator, and/or business person. Activities to ascertain the feasibility of a program could include the following:

1. Get permission from school officials to investigate prospective program.
2. Obtain information about operation of a COE program from State Department of Education and other teacher-coordinators.
3. Consult key individuals among employers, employees, schools, service organizations, and other agencies for regarding desirability for program.
4. Utilize a temporary advisory committee to assist in contacts and surveys.
5. Survey students to determine needs, interests, and availability for employment. (Appendix A)
6. Conduct an occupational survey to determine the number and types of available training stations. Assistance for such a survey can be obtained from a temporary advisory committee, Chamber of Commerce, service clubs, labor groups, counselors, and State Department of Labor. (Appendix B)
7. Evaluate data from the following additional sources:
   a. Parent interest survey
   b. School board recommendations
   c. Faculty recommendations
   d. Guidance counselor recommendations

Outline a Tentative Program

Once the need and feasibility for a COE program has been proven, a written outline for its implementation must be devised. Such an outline should include: philosophy, objectives, program management, personnel, responsibilities, advisory committee functions, classroom accommodations, and estimated costs.

Present Program Proposal to Administrators

A written program proposal should be submitted to the following levels of administration: high school principal, parish vocational supervisor, and the State Department of Education. The staff of the Business Education Section, State Department of Education, is available to assist the parishes or local schools in establishing new programs and to work with local administrators or coordinators.

Begin Program Operations

Program operations must be headed by a qualified teacher-coordinator. Essential personal characteristics and state requirements (previously cited in the COE program) are to be considered in the selection of the teacher-coordinator.

Putting the COE program into operation is then the teacher-coordinator's responsibility. The teacher-coordinator's duties at this point are basically the same as those of a coordinator in an established program with the exception of public relations. A new program will require more publicity to both prospective students and employers as it is being established.

APPENDICES A AND B

APPENDIX A -- STUDENT INTEREST SURVEY

APPENDIX B -- OFFICE OCCUPATIONS SURVEY

APPENDIX A
STUDENT INTEREST SURVEY

1. Name ____

2. Sex ( ) Male ( ) Female

3. Year in School ( ) Freshman ( ) Sophomore ( ) Junior

4. How would you describe your present health? ( ) Excellent
   ( ) Good ( ) Average ( ) Poor

5. Do you have any physical disabilities? ( ) Yes ( ) No
   If yes, please describe. (It is essential to know whether you are confined to a wheelchair, hard of hearing, partially blind, etc., so that we can develop optimum programs and facilities to serve you.)

   ____

   ____

   ____

6. Father ____

   Occupation ____

   Where is he employed? ____
   (Name of Employer)

   ____
   (Address)

7. Mother ____

   Occupation ____

   Where is she employed? ____
   (Name of Employer)

   ____
   (Address)

8. Parents' educational background: Check one of the following for each parent.

Mother	Father	
( )	( )	Not a high school graduate
( )	( )	Graduated from high school
( )	( )	Business school or trade school
( )	( )	Some college
( )	( )	Graduated from college
( )	( )	Do not know how much education

9. Number of children in the family at home ____________________

10. Which high school course, program, or curriculum best describes the one in which you are enrolled?

( ) 1. Business
( ) 2. College preparatory
( ) 3. Shop or industrial arts
( ) 4. Agriculture
( ) 5. General
( ) 6. Home Economics
( ) 7. Fine Arts
( ) 8. Other: (Specify)

11. To the best of your knowledge, what is your average grade in all of your high school courses?

( ) 1. A
( ) 2. B
( ) 3. C
( ) 4. D
( ) 5. Failing

12. What do you plan to do on a full-time basis during the first year after you complete high school? (check all that apply)

( ) 1. Work full time
( ) 2. Get married
( ) 3. Enter military service
( ) 4. Work at home for parents
( ) 5. Attend college or university
( ) 6. Enroll in some type of educational training such as business college, trade school, technical school, or a nurses' training school (school name ____________________)
( ) 7. Attend college full time and work part time
( ) 8. Work full time and attend college part time
( ) 9. Other (specify) ____________________

13. How do you think your parents feel about whether you attend college after high school graduation?

( ) 1. Insist or expect me to go
( ) 2. Want me to go if I want to
( ) 3. Do not care one way or the other
( ) 4. Do not want me to go or will not allow me to go

14. If your future plans "do not" or "probably do not" include going to college, indicate the reasons.

( ) 1. Tired of studying
( ) 2. Want to get a job
( ) 3. Costs too much money
( ) 4. What I want to learn is not at college
( ) 5. Feel that I do not have the ability
( ) 6. Other (specify) ____________________

15. If your plans "probably" or "definitely" include attending college, which college will you most likely attend immediately after high school? ______________________________

16. What do you want to do for your life's work-vocation or occupation?

Please name: first choice ______________________________

second choice ______________________________

17. Who do you believe has influenced greatly your occupational choice the most?

☐ Mother
☐ Father
☐ Grandparents
☐ Older brothers and sisters
☐ Teachers
☐ Counselors
☐ Fellow Students
☐ Others (what do they do?) ______________________________

18. Which do you think is most important in a job? (check only one)

☐ 1. Security
☐ 2. High pay
☐ 3. Nice working conditions
☐ 4. Prestige
☐ 5. Chance for advancement
☐ 6. Being able to find a job
☐ 7. Liking your work
☐ 8. Other: (list) ______________________________

19. Do you (or have you) participated in any type of work experience during the summer or after school hours?

☐ Yes ☐ No If yes, answer the following:

1. Check the type of work experience you have had or have now.
   ☐ Regularly after school
   ☐ Full time during the summer
   ☐ Occasionally
2. How many hours a week? During school year _____ summer _____
3. Approximately how much do you earn a week (before deductions)?
   During school year _____ summer _____
4. What work do you do?
   During school year ______________________________
   Summer ______________________________

20. To attend a school or an occupational program of your interests:

1. Could you commute up to 10-20 miles?
   ☐ Yes ☐ No ☐ Don't know

2. Would you work part time and summers to earn your tuition and expenses for education after high school?
   ☐ Yes ☐ No ☐ Don't know

21. After you finish high school, do you

( ) 1. Prefer to remain in the (insert local town name) area if you can find a job?
( ) 2. Want to move to (insert name of a city) area?
( ) 3. Don't know--it depends on (give reason) ____________________
____

22. The men and women of this nation are employed in thousands of different occupations. It will never be possible for (insert name of school) to offer programs in all of these different occupations. It is, however, possible for several new career programs to be offered.

You can help in the planning of future programs by identifying the types of jobs in which you would be interested for your career.

APPENDIX B

______________________ PARISH

OFFICE OCCUPATIONS SURVEY

Your firm's name will not be used in connection with your answers. The information furnished by you and other businesses will be used for statistical purposes only. However, if there are any questions which you do not wish to answer, please omit them.

Name of Business ______________________ Type of Business __________

Address of Business ____

Name of Owner or Manager ______________________________________

Number of full-time office employees: Male _____ Female _____

Number of part-time office employees: Adult Male _____ Female _____
High School Male _____ Female _____

Beginning salary of office employees hired ________________________
Average or range

Name or types of employment tests administered ____________________

____

Minimum number of years of new full-time office employees __________

Minimum proficiency level required for new full-time office employees:

Typewriting ________ Shorthand ________

Place additional comments concerning education and training desired of new full-time employees on the reverse side of this sheet.

Do you have a formal training program in your firm? Yes ___ No ___

Do you have difficulty securing competent office workers? Yes ___

No ___ If yes, which area? ________________________________

What do you feel are likely to be the best employment opportunities in office occupations during the next few years?

____

Would your firm be willing to provide part-time employment to a cooperative office education student? Yes ___ No ___

Would you like more information concerning the program? Yes ___ No ___

Check below the types of office occupations which exist in your firm:
( ) Receptionist
( ) Stenographer
( ) Clerk Typist
( ) Calculating Machine Operator
( ) Key Punch Operator
( ) Word Processing Operator
( ) File Clerk
( ) Secretary
( ) Duplicating Machine Operator
( ) General Office Clerk
( ) Transcribing Machine Operator
( ) ______________________________

Check below the kinds of learning experiences that your firm's office could offer the student:

Typewriting
( ) Business letter
( ) Memorandums
( ) Form letters
( ) Type and correct spirit masters, stencils, or offset masters
( ) Printed business forms (invoices, monthly statements, etc.)
( ) ______________________________

Adding and Calculating Machine
( ) 10-key adding
( ) 10-key printing calculator
( ) Electronic calculator
( ) ______________________________

Taking Dictation and Transcribing
( ) Write shorthand
( ) Transcribe shorthand
( ) Operate shorthand machine
( ) Transcribe from recorded media--belt, disc, etc.
( ) ______________________________

Telephoning and Communicating
( ) Place local and long distance telephone calls
( ) Answer telephone
( ) Screen employers' calls
( ) Record telephone messages
( ) Compose business correspondence
( ) ______________________________

Operating Office Machines and Equipment
Typewriters
( ) Electric
( ) Manual
( ) Electronic
Data Processing Equipment
( ) Key Punch
( ) ______________________________
Word Processing Equipment
( ) ______________________________
Duplicating Machines
( ) Spirit duplicator
( ) Stencil duplicator
( ) Offset duplicator
( ) Copying machine
( ) ______________________________
Clerical Tasks
( ) Performing mailing tasks
( ) Filing
( ) Financial and record keeping tasks
( ) ______________________________

____
Name and Title of Company Official

Source: Cooperative, Distributive and Office Education Programs, Bureau of Business Education, California State Department of Education.

ENROLLMENT

A minimum of 10 students must be enrolled in COE to start a training program, a minimum of 15 students or less for one month extended employment, and 16 students or more for two months extended employment.

In order for a student to enroll in the COE training program, the school may require specific courses, a certain letter grade in required courses, or a specific grade-point average.

There are specific criteria which should be met prior to enrollment. The criteria listed below are in addition to any criteria required by an individual school. The student should:

1. be 16 years of age.
2. be entering his/her senior year.
3. have parental consent.
4. have completed Typing I.
5. have and maintain a "C" average.
6. provide his/her own transportation to the job.
7. have a satisfactory school attendance and disciplinary record.
8. be required to enroll in a related class.

If a student does not meet the criteria outlined above and the criteria set by a school, that student should be discouraged from applying for the COE training program through the use of the recruitment process.

In order to select the most qualified students for the program, there are three stages which should be completed. They are:

1. The Recruitment Process
2. The Application Process
3. The Selection Process

The Recruitment Process

Recruitment activities should be conducted throughout the year. Most activities are concentrated at certain points in the year: (1) during pre-enrollment or pre-registration time and (2) at the beginning of the school year.

During the recruitment process, a plan should be developed for recruiting students who satisfy the criteria needed for enrollment into the program (Items 1-8 above).

The following steps are recommended for recruiting qualified students.

1. Develop a brochure or one-page flyer outlining the purposes, advantages, prerequisites, and application procedures for the cooperative program. Include directions about a time and place to leave application or to meet with teacher-coordinator. (Appendix C)
2. Use the recommended application form. (Appendix D)
3. Meet with the general faculty and guidance counselors as a group or individually to explain the cooperative program, its benefits to the students and the school, and the application procedures prior to beginning the recruitment process.
4. Supply the department faculty and counselors with recruitment brochures and application forms.
5. Make arrangements for recruitment activities such as:
    a. Homeroom announcements
    b. All-school assembly
    c. After school meeting for interested students
    d. Speeches in homeroom and prerequisite courses
    e. Bulletin boards
    f. Community and/or parents' meetings
    g. Hand-out brochures to students
    h. Radio programs, articles in local and school newspapers
    i. Special career days
6. Conduct your recruitment activities. Be available at the time and place announced.

The Application Process

Those students who meet the initial criteria should make a formal, written application for enrollment and be interviewed by the teacher-coordinator.

Steps which should be followed in the application process are:

1. The student should fill in and return an application for enrollment. (Appendix D)
2. Schedule an interview with the student applicant at a convenient time and in a quiet, private place. (Appendices E and F)
3. The assistance of the teachers should be requested to assess the "employability" of the COE applicants. (Appendices G, H, and I)

During the application process, the teacher-coordinator should check the students' school records. This may be done before or after the interview.

The Selection Process

Students should be selected for the program based on their:

1. ability to meet the established criteria.
2. application.
3. interview.
4. recommendations from other teachers.

Upon selecting those students eligible for enrollment, the teacher-coordinator should notify the student applicants in person or by letter. (Appendix J)

After the students have been notified, they should sign a student agreement form that itemizes some of the policies and procedures inherent in the cooperative program. (Appendix K)

The students who have been selected must be placed on a job and sign a training agreement before full approval for admittance to the program is final.

APPENDICES C THROUGH K

APPENDIX C -- RECRUITMENT BROCHURE

APPENDIX D -- STUDENT'S APPLICATION

APPENDIX E -- PERSONAL INTERVIEW FORM

APPENDIX F -- INTERVIEW RATING

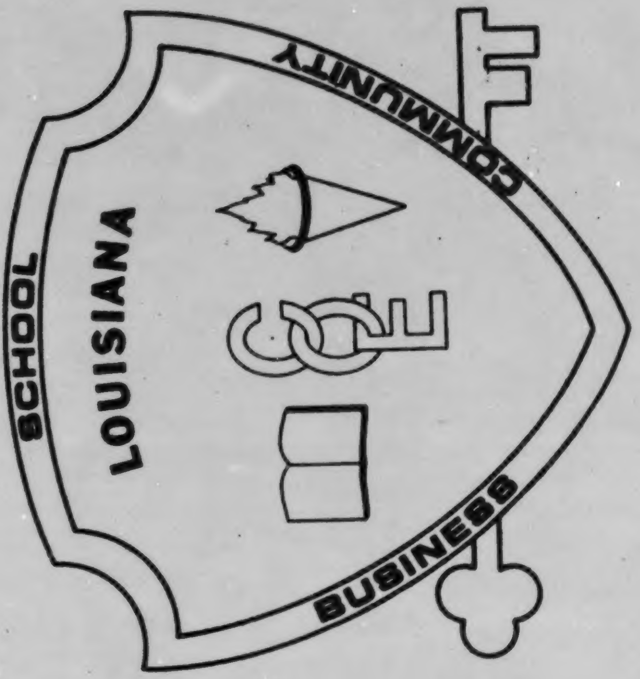
APPENDIX G -- MEMO TO TEACHERS

APPENDIX H -- FACULTY EVALUATION OF PROSPECTIVE COE STUDENTS

APPENDIX I -- TEACHER RECOMMENDATION

APPENDIX J -- LETTER OF NOTIFICATION

APPENDIX K -- STUDENT AGREEMENT


COMMUNITY
SCHOOL
LOUISIANA
CCE
BUSINESS

SCHOOL NAME

(Recruitment Brochure)

What is COE?

Cooperative Office Education is a program of instruction which trains students in stenographic, clerical, data processing, or bookkeeping skills for careers in these fields. It is a partnership between the school, the student, and a local businessman.

Student trainees attend school part-time and receive supervised work experience under actual working conditions for wages.

What are the requirements for enrollment?

1. Be 16 years of age
2. Be entering his/her senior year
3. Have parental consent
4. Have completed Typing I
5. Have and maintain a "C" average
6. Provide his/her own transportation to the job
7. Have a satisfactory school attendance and disciplinary record
8. Be required to enroll in a related class

Pick up your application blank in the COE Office today and return it as soon as possible to:

Teacher's Name

in

Room Number

You will be called in for an interview as soon as your application has been processed.

What are the values of COE training?

1. Gives balanced training between theory and practice.
2. Prepares many for the type of work for which they are adapted.
3. Increases contact with realities of life.
4. Provides actual work experience.
5. Money can be earned while learning.
6. Provides valuable on-the-job training.
7. Assists in developing ability to get along with people.
8. Provides increased chances for advancement.
9. Gives school credit for on-the-job training.
10. Develops self-confidence.
11. Makes school more interesting and meaningful.
12. Provides marketable skills to aid students in more advanced training.
13. Often leads to full-time employment.
14. Motivates interest in school subjects.
15. Provides a tryout in an occupation which may aid in the choice of a life career.

APPENDIX D

COOPERATIVE OFFICE EDUCATION

STUDENT'S APPLICATION

Date ____________

Name ____________ Sex ______ Birthdate ____________ Age ______
Last First Middle
Single ______ Married ______

Address ____________ Telephone ____________ Race ______

Height ______ Weight ______ General health: Good ______ Average ______ Poor ______

Physical Handicaps ____________ Homeroom Teacher ____________

Wear glasses? ______ Social Security No. ____________

Have you had any disciplinary action (suspensions, etc.) in school? Yes ______ No ______

Days absent ______

Are you a member of a family with income at less than $3,000 a year? Yes ______ No ______

Are you receiving any special counseling, social work, or physical services? ____________

____

High School Subjects and Grades Earned

Freshman Year		Sophomore Year		Junior Year	
Subject	Grade	Subject	Grade	Subject	Grade

In considering preparation for a career, in what type of work do you desire training while attending school?

First choice ____________ Second choice ____________

Name of parent or guardian ____________

Address ____________ Business Telephone ____________

Father's Occupation ____________

Mother's Occupation ____________

Do you plan to graduate at mid-term? Yes ______ No ______

Do you plan to marry before graduation? Yes ______ No ______

What do you plan to do after graduation? ____________

Are you working now? ______ Where? ____________

Address ____________ Telephone ____________

School organizations you belong to: ____________

Church ____________ Other activities ____________

What high school teacher would recommend you for the program? ____________

List jobs you have had:

Employer and Address	Types of Duties	Time Period

APPENDIX E

PERSONAL INTERVIEW FORM

NAME ____________________ Date ____________, 19____

What do you plan to do after graduating from high school? ____________________

If work, what are your ambitions? ____________________

What will you do with the money you earn while in the program? ____________________

Do you like school? YES ____ NO ____ (WHY) ____________________

Are you enthusiastic over the possibility that you may qualify to take Cooperative Office Education? ____ YES ____ NO

(WHY) ____________________

What do you think will be the most interesting phase of working in a Cooperative Office Education? ____________________

____

Are you working now? YES ____ NO ____ (WHERE) ____________________

How long employed by this firm? ____________ Present hourly wage $ ____________

Do you prefer this firm as your training station (if approved by the Advisory Committee)? YES ____ NO ____

(JUSTIFY) ____________________

Do you think the class should have its own club organization, to have social and educational activities of its own planning? YES ____ NO ____ (WHY) ____________________

____

If the class should take a field trip, do you think the group should go by private automobile or by public transportation? ____________________

(WHY) ____________________

If by private automobile, do you agree with school policy of one adult chaperone in each car? YES ____ NO ____

(WHY) ____________________

Do you think it is important for a school or place of employment to have policies that determine what a group under its authority may or may not do in the discharge of their duties or obligations to that organization?

YES ____ NO ____ (WHY) ____________________

____

What should an individual do if he is told to do something by his teacher (or employer) even though that individual feels that such action is not necessary or he feels he knows of a better way of accomplishing the same result?

____

____

QUALITY	HIGHLY ACCEPTABLE	ACCEPTABLE	DOUBTFUL	NOT ACCEPTABLE
Personality				
Attitude				
Cooperation				
Calmness				
Respect for authority				
Acceptance of policies				

APPENDIX F
INTERVIEW RATING

NAME ______________________________ Age _____ Date ______________

QUALITIES TO BE RATED	HIGHLY ACCEPTABLE	ACCEPTABLE	NEEDS HELP
Personal appearance and grooming			
General knowledge for the job			
Personality and manners			
Speech, voice, and conversational ability			
Attitude			
Enthusiasm or interest			
Initiative or originality			
Maturity and poise			
Reasoning and judgment			
Sincerity			
Tone of the interview			

COMMENTS OF THE INTERVIEWER:

Interviewed by ______________________________

Organization ______________________________

APPENDIX G

DATE: Current

TO: Teachers

FROM: Teacher-Coordinator

SUBJECT: Evaluation of Cooperative Office Education Applicants

Your assistance is requested to help me to assess the "employability" of prospective COE students. The students should be evaluated in relationship to the following expectations that business has of a beginning student worker.

1. Full day's work for a full day's pay.
2. Adherence to employer's established customs and policies.
3. Proper care of employer's equipment, materials, and supplies.
4. Good judgment in handling confidential company information.
5. Respect for supervisors and other management personnel.
6. Initiative and originality on the job.
7. Regularity of attendance and punctuality.
8. Company loyalty.
9. Appropriate personal appearance and good grooming habits.
10. Accuracy and completeness of assigned tasks.

Please complete and return the attached sheet to my faculty mailbox by (Insert Date). I sincerely appreciate your cooperation.

(Memo to Teachers)

APPENDIX H
FACULTY EVALUATION OF PROSPECTIVE COE STUDENTS

COE Applicant	Highly Acceptable	Acceptable	Doubtful	Not Acceptable
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				
16.				

COMMENTS:____

____

Signature of Teacher:___________________________________

Date:____

APPENDIX I
TEACHER RECOMMENDATION

MEMO TO:

MEMO FROM: COE Coordinator (name)

DATE:

________________________________ has applied for enrollment in the COE program for the coming school year. Please assist me in determining his/her eligibility by supplying the following information:

Subject: ________________________

Grade: ________________________

Attendance: ________________________

Was he/she:

Dependable ________________

Industrious ________________

Courteous ________________

Emotionally stable ________________

Do you:

Highly recommend ________________

Recommend ________________

Cannot recommend ________________

Comments: ____

____

____

____
Signed

APPENDIX J

Current Date

Name of Applicant
Street Address
City, State Zip Code

Dear Applicant:

You have been selected for the 19__ - 19__ Cooperative Office Education class. With this honor comes your responsibility to ________________ High School to represent it as a model student and office worker at all times.

The COE class will officially begin this summer with parish-wide and local workshops. Dates and time schedules for them will be announced later. Attendance at these workshops is mandatory, so keep that in mind when you are making your personal plans for the first of the summer.

In the meantime, a brief orientation meeting will be held (Insert Date) in Room No. (Insert Room No.). Please make arrangements to be present so that we can discuss your immediate future in COE.

Sincerely,

Teacher-Coordinator

(Letter of Notification)

APPENDIX K

COOPERATIVE OFFICE EDUCATION

_______________ High School

Cooperative Office Education is designed to provide on-the-job training and in-class school preparation for office occupations. Students accepted for this program must be 16 years old, have and maintain a "C" average, be a senior during the training period, provide their own transportation to the job, have a satisfactory school attendance and disciplinary record, and have their parents' approval to be in the program.

Upon acceptance for the Cooperative Office Education program, the student and his/her parents must understand and observe the following requirements and responsibilities:

1. A COE student must complete the full school year in order to receive the 3 credits for the related class instruction and on-the-job training. No COE student who elects to graduate at midterm can expect any partial credit.
2. Students are expected to attend both school and work each day. If a student is absent from school, he/she must receive permission from the coordinator to go to work that day. A student may not attend school in the morning and expect to be permitted to miss work. Attendance at school and work go together. Excessive attendance violations will not be permitted.
3. The COE coordinator must know where each student is at all times during school and work. A student who cannot come to school or report for work must notify the coordinator by 8:30 a.m. No student may leave school without permission of the COE coordinator.
4. Students will be responsible for notifying their employers as early as possible when they will be absent from or late to work.
5. Absences from and tardies to school and/or work must be reported by the student on the appropriate written form to the coordinator.
6. Students will work an average of 15-25 hours per week. The total in-school hours and on-the-job hours should not exceed 48 hours per week.
7. Student work hours are set by individual employers. The student should be willing to work during school vacations such as Thanksgiving, Christmas, etc.
8. Time off from work for valid reasons should be arranged in advance (1-2 weeks) in cooperation with the COE coordinator and the employer.
9. A COE student may not quit his/her job without prior approval of the coordinator. Students not working cannot receive course credit.

10. Wage rates will be set by the employers. The coordinator urges all employers to pay the minimum wage. However, employers may legally elect to pay no less than three-fourths of the minimum wage rate.

11. A COE student is expected to follow the rules of ______High School and the rules of the training station where he/she is employed. Thefts of money or merchandise or any other serious infraction of employment regulations will not be tolerated.

12. Upon being hired, a COE student should acquaint himself/herself with:

    Company rules and policies
    Working hours
    Names and titles of persons with whom he/she works
    Dress regulations
    Pay period

13. Rules of etiquette are to be observed at all times.

14. Students will be periodically rated on the job by the training station supervisor. The coordinator will review each student's training station evaluation with him/her at the end of each grading period.

15. Students should keep the coordinator informed about any problems or changes in schedule that may confront them on the job or in school.

16. An interview does not guarantee one a job. Students may be sent on several interviews before they are hired. Students are not guaranteed jobs in a certain geographical area. The coordinator does not decide where a student is hired. The final decision is left up to the employer.

17. COE students will be dues-paying members of the COE club and participate in all club activities which include the _______ fund raising project and the Employer Appreciation Dinner at the end of the year.

All students in Cooperative Office Education must observe the preceding rules. Infractions of these rules can result in the student's dismissal from the course and a grade of "F."

____
(Name, Coordinator)

____
(Name, Principal)

I have read and understand the policies of the ______ High School Cooperative Office Education program and give my permission for ____________________ to enroll in it. I understand and expect my child to understand and follow the rules of the program.

______________________________	______________________________
Date	Parent's Signature

I have read and understand the policies of the ______ High School Cooperative Office Education program. I agree to follow the rules of the program at all times while I am a member of the program.

______________________________	______________________________
Date	COE Student's Signature

(Student Agreement)

PLACEMENT

Employment in a Cooperative Office Education program is considered an extension of the classroom instruction. Student placement begins with recruitment. Once enrollment is established, training stations must be carefully evaluated, and student placements should match career objectives, interests, and abilities with jobs at specific training stations. The training station provides diversified and supervised work experience in the occupation selected by the student.

Placement must be mutually acceptable to both employer and student (as well as the parents of a minor) and have the teacher-coordinator's approval. The development and success of a COE program is largely dependent upon the degree to which the coordinator can locate and develop good training stations.

STAGES IN PLACEMENT

Successful placement involves a step-by-step process that begins with the recruitment and identification of the student-trainees. Basic stages are much the same for all COE programs with the exception of minor additions or adjustments to meet the idiosyncracies of individual school systems.

TRAINEE INFORMATION

The teacher-coordinator must be fully informed in any and all areas concerning the student-trainee. To avoid unnecessary problems, the student and his/her parents must understand completely what is expected of him/her as a member of the Cooperative Office Education program.

Identification Card

The student-trainees were selected for enrollment earlier. By now the coordinator has checked to see that they are 16 years of age, have social security numbers and birth certificates, and have indicated a career objective or vocational goal. This data was recorded on each trainee's Student Information Card and placed in the file. (Appendix L)

Student Agreement

Have a signed student agreement form on file for each student. Before placement, ask each student to sign and return this form. This agreement lets the student know in advance and in writing the policies and procedures of the COE program concerning (a) absenteeism and attendance regulations, (b) credit hours and grades, (c) the role of the coordinator in establishing working hours, hiring, and resigning, and (d) the student's responsibilities to the program. (Appendix K)

APPENDIX L
EXAMPLE OF STUDENT INFORMATION CARD

Employer's Name

Address

Telephone | **Person to See -- How to Reach**

Type of Business

Summary of Job (Date started to work__________)

Student's Name

Address

Social Security No.

Telephone | **Sex** | **Birthdate** | **Age**

Parent's Name

Occupational Objective OE Code__________

Skills, Knowledge, Abilities

SCHOOL SCHEDULE

Hour	Subject	Teacher	Room No.
1			
2			
3			
4			
5			
6			
7			

Date of Visit	Person Contacted	Comments

72/9/229

TRAINING STATIONS

The coordinator should develop and maintain a Training Station Resource File for reputable companies that employ individuals for the type of job title needed. Once a training station has been established, maintain it.

TRAINING STATION RESOURCE FILE

Name of Firm ______________________________

Type of Business ____________________ Date ____________

Address ____________________ Telephone ____________

Contact Person ______________________________

Type(s) of Jobs Available ______________________________

____

Hours ____________________ Wages ____________

Comments ______________________________

____

____

(front)

Student Placed	Dates	Job Title	Comment

(back)

Employer Contact

Visit potential training stations to gain their cooperation. Some coordinators in established programs send a letter to past, as well as potential training stations just prior to starting the placement of students. They ask employers to call or write if they have part-time openings or anticipate having them in the near future. However, the teacher-coordinator should follow a definite criteria in the selection of training stations.

The following items are suggested as criteria in selecting stations.

The prospective training station:

1. should have a good reputation of ethical business practices.
2. should provide a variety of direct experiences associated with the occupation that requires both skills and knowledge and not merely routine work of a repetitive nature.
3. should have a sponsor interested in assisting in the training of the student-learner and in establishing good supervisor and student-learner relationships.
4. should furnish a minimum of fifteen working hours per week.
5. should be accessible to the school.
6. should be willing to pay the student the prevailing wage for beginning workers with similar training and experience.
7. should have up-to-date facilities and equipment.
8. should be safe and free of hazards that might impair the safety or health of the student-learner.
9. should be willing for the coordinator to visit the business and observe the student-learner, as well as provide time for conferences with the coordinator to plan, evaluate, and discuss the student's experience, progress, or problems.
10. should agree to promote school attendance and cooperate with the coordinator in maintaining the standards and rules of the program.

It is equally important that the coordinator have a definite plan for his/her visit with a potential training station before he/she even moves in that direction. The following are suggested guidelines.

Prior to the visit:

1. call and arrange an appointment with a top management person; secure the correct name and title of the person to be visited from the secretary or receptionist.

2. arrive on time.

3. if possible, take along brochures or other information that describes the cooperative program and company benefits.

During the visit:

1. introduce oneself; call the person by name; use the business card.

2. state the purpose of the call.

3. briefly explain the purpose of the cooperative program and emphasize the benefits to the company and the community.

4. encourage questions and answer questions thoroughly.

5. discuss problem areas; meet problems calmly and admit to areas of concern; avoid controversial issues.

6. hand out brochure briefly outlining the program, roles of each party, and suggested procedures. Avoid making the program sound too complicated by itemizing too many details.

7. seek the employer's cooperation - "Will you employ one or two students this year?"

8. if the employer agrees, describe the type of job needed and determine what job(s) they have available. Secure the name of the person one should contact for making further arrangements.

9. even if a "no" answer is received, conclude the interview by thanking the employer. Ask the employer to please call if a suitable job becomes available. Leave information and a business card.

After the visit:

1. record impression of visit on the "Evaluation of a Training Station" form. An example of this form can be found in the EVALUATION PROCESS section.

2. follow-up with a letter thanking the employer for visiting with you and, if appropriate, for agreeing to cooperate as a training station.

Training Agreement

As one locates job openings and seeks employer cooperation as a training station, work for an understanding concerning the school's needs and the company's needs, as well as the role of each in the program. The general policies are explained on the training agreement; review them with the training sponsor. (Appendix M)

Student Interviews

Select students for interviews. Talk with each student about the job and establish mutual approval prior to sending him/her on the interview. In selecting students for interviews, take care to match, as nearly as possible, student interests and abilities with the requirements of the job. Ask the employer to confer with the coordinator before making any commitment to a student-applicant.

Introduction Cards

Give each student-applicant an introduction card that tells the employer that this is the cooperative program student who you discussed with him/her earlier, and who is arriving for an interview. (Appendix N)

Have students report their impressions as soon as they have been interviewed. If a student dislikes a specific situation, the teacher-coordinator should determine what the reason is and decide if it is a legitimate one.

Trainee Orientation to the Job

Coordinate the student-trainee's orientation to the job. This could be accomplished with a checklist. Use one checklist for each student and mark each item as it is completed. Some items that could be included on the checklist are:

____ 1. Explain the business giving specific information about the area where the student will work.

____ 2. Give the student-trainee the location of the office, names of those with whom he/she will work, and the possible duties he/she could be asked to perform.

____ 3. Inform the student-trainee exactly for whom he/she will be working and where his/her responsibilities lie concerning his/her supervisor.

____ 4. Inform co-workers of their relationship to the student and seek their cooperation.

____ 5. Be certain the student is informed of arrival time, departure time, check-in procedures and check-out procedures.

____ 6. Inform the student of lunch time, relief procedures, and regulations.

____ 7. Be certain the student is informed concerning time-recording procedures, pay schedule, deduction from pay and computation of wages.

____ 8. Inform the student as to appropriate clothing to be worn.

____ 9. Stress the need for confidentiality in any work situation to the student.

____ 10. Seek the cooperation of the employer in providing the student with special pamphlets, brochures, and materials that include information about the company, its policies, fringe benefits, and related terminology.

Training Plan

Develop the training plan with the training supervisor. A step-by-step training plan should be developed for each student. Listed below are suggested guidelines for the successful use of the training plan.

1. Each student is to have a training plan. A new training plan is necessary each time a student changes job stations.
2. Discuss the proposed training plan with the training station supervisor.
3. Review and update training plans as needed.
4. Complete training plans prior to the beginning of work.
5. Each party affected by the training plan should have a copy for his/her files.

The training plan can be the best understood and most serviceable instrument used in describing the capabilities of the student and the related job requirements. It is an open means of understanding between the coordinator, employer and trainee. (Appendices O and P)

Related Instruction

Plan related instruction topics and activities based on the training agreement and training plan immediately. Needs determine priorities. The RELATED INSTRUCTION DIVISION provides suggested topics that may need to be reviewed.

APPENDICES M THROUGH P

APPENDIX M -- COE TRAINING AGREEMENT

APPENDIX N -- STUDENT INTRODUCTION CARD

APPENDIX O -- COE TRAINING PLAN

APPENDIX P -- COE TRAINING PLAN

APPENDIX M
COOPERATIVE OFFICE EDUCATION

TRAINING AGREEMENT

(Name of School)

The employer ______________________________
(Name and Address)

agrees to employ ______________________________
(Name and address of student-learner)

on a part-time arrangement. This will serve to outline the conditions under which an effective work-experience program may be carried on.

1. The employer will assist the school in supplementing the cooperative education program by providing diversified work experience on a part-time basis during the school year.
2. The student will attend school half of each day and work a minimum of fifteen (15) hours a week.
3. The employer will assign some members of his organization who will have a continuing responsibility for the training and supervision of the student-learner. The person responsible for this training on the job is

   ____
   (Name and Title)
4. The student-learner will be paid a beginner's wage of ________ per hour.
5. The teacher-coordinator will be permitted to visit the training stations to observe the student at work and evaluate his program.
6. At regular intervals the coordinator will consult with the employer or immediate supervisor of the student-learner for the purpose of evaluating the student's progress.
7. The coordinator will teach courses related to the work of the student, correlate the school instruction with the work experience, and assist the employer in developing the student during employment.
8. The student agrees to report for work punctually and regularly. He also agrees to follow the orders and instructions of the supervisors at all times and perform diligently the work he is assigned.
9. All complaints shall be made to and adjusted by the teacher-coordinator.

10. This agreement may be terminated by the employer at any time after consultation with the teacher-coordinator.

    The teacher-coordinator may terminate this agreement at any time after consultation with the employer.

    The student may change his place of employment only after consultation with and approval by the teacher-coordinator.

The student will work from ________ to ________ daily for a total of ________ hours a week.

The student's work period will begin ________________________
(Date of Employment)

SIGNATURES:

________________________ Teacher-Coordinator

________________________ Administrator

________________________ Parent or Guardian

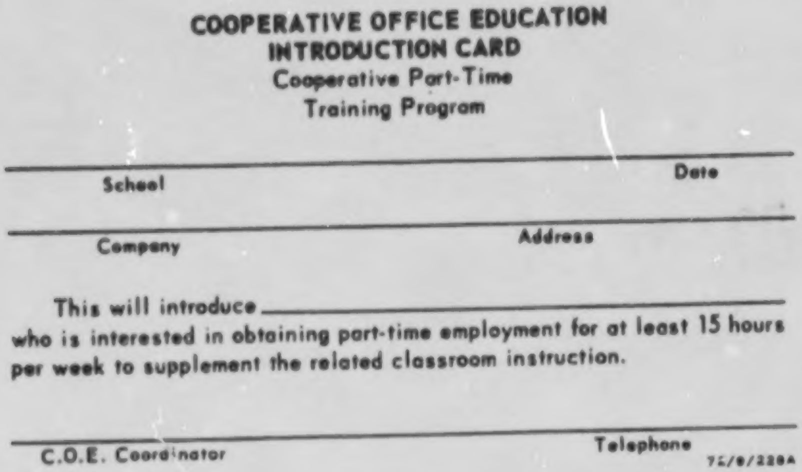
By ________________________ Employer or Representative

________________________ Date

________________________ Student-Learner

66

APPENDIX N
STUDENT INTRODUCTION CARD



COOPERATIVE OFFICE EDUCATION
INTRODUCTION CARD
Cooperative Part-Time
Training Program

School ________________________ Date

Company ________________________ Address

This will introduce ________________________
who is interested in obtaining part-time employment for at least 15 hours per week to supplement the related classroom instruction.

C.O.E. Coordinator ________________________ Telephone

72/8/228A

APPENDIX O

(4 [illegible]

STATE OF LOUISIANA
DEPARTMENT OF EDUCATION
BATON ROUGE, LOUISIANA

Co-operative Part-Time Training Memorandum

PROGRAM__________________

Employer	Student	Sex	Age	Birthdate
Local Public Schools	Social Security No.	Occupational Objective	O. E. Code	
Beginning Salary ___ Hour ___ Week				
Length of Training Period	Work Permit No.	Year in Vocational Cooperative Program		

This memorandum of training between the above-named student and employer will serve as a plan for training under the co-operative part-time arrangement, and will outline the conditions under which effective training, of great value to both employers and students, may be carried on. It will be considered complete when the employer and teacher-coordinator have outlined on the back the on-the-job training and the related instruction which will be followed by the student-trainee.

EMPLOYER

1. The employer shall have final selection of those students who are found qualified for work in the occupation.
2. The employer agrees to offer the student the greatest possible variety of job experiences within the student's individual capabilities to enable him/her to prepare as completely as possible for the occupation for which the training outline prescribes.
3. The training station sponsor will assist the teacher-coordinator by giving pertinent information which will assure the successful progress of the student-trainee.
4. The schedule of compensation shall be mutually agreed upon by the training station and the trainee.
5. An experienced employee shall be assigned to assist in training the student-learner.

STUDENT

1. The student agrees to perform diligently the work experiences assigned by the employer according to the same company policies and regulations as apply to regular employees, and his/her employment may be terminated for the same reasons as other employees.
2. The student shall attend school half of each day, including a one hour related class and work in the establishment providing job training experience an average minimum of 15 hours during the school week.
3. Employment shall not be terminated by the trainee without the coordinator's approval.

PARENTS

1. The parents are asked to provide co-operation and encouragement to the student as he pursues his training program.
2. The parents (or guardian) will be responsible for the personal conduct of the student-trainee while participating in the cooperative part-time program.
3. The parents (or guardian) will assume full responsibility for any action or happenings pertaining to the student-trainee from the time he leaves school until he reports to his or her training station.
4. The parents (or guardian) and student trainee understand that the cooperative part-time program is organized and maintained primarily for high school students, (Juniors and Seniors 16 years of age or over) to secure training that will better fit them as potential full-time employees in an occupation

COORDINATOR

1. The teacher-coordinator will provide instruction related to the work of the students and will correlate the classroom activities with the on-the-job training.
2. The teacher-coordinator and training station sponsor will work closely together on all problems concerning the mutual welfare of all parties concerned and especially for the successful progress of the student-trainee.
3. The teacher-coordinator will at regular intervals observe the student-trainee while on the job, and check with the training sponsor in order to assure successful occupational progress.
4. The teacher-coordinator shall evaluate the student's related class work and the employer's progress report to determine the student's grade.

GENERAL

1. It is understood that the employment of this student will be in accordance with all state and federal labor laws.
2. The employment of a regular employee shall not be terminated to create a position for the training of a student.
3. The trainee is selected without discrimination.
4. The trainee will be given instructions in safety procedures and use of equipment.

THIS TRAINING PLAN IS NOT COMPLETE WITHOUT A TRAINING OUTLINE (Over)

We, the undersigned, indicate by the affixing of our signatures that we have read and understand the purpose and intent of this training memorandum.

____
Date

By: ____________________
Training Station Sponsor

____
Teacher-Coordinator

____
Address & Telephone

____
Student-Trainee

____
Parent or Guardian

____
Address & Telephone

____
Division of Vocational Education

Outline of On-the-Job Training

Reverse of Appendix 0

Outline of Related Assignments

APPENDIX P

COOPERATIVE OFFICE EDUCATION
TRAINING PLAN - 19___ - 19___

Business Firm - Training Station

Address

Training Supervisor

Business Telephone

Date of Employment

Student-Trainee

Trainee Job Title/O.E. Code

Work Permit Number

Dates of Training Period

Career Objective

JOB DESCRIPTION

The student-trainee will consider his job experience as contributing to his career objective and will perform his training-station and classroom duties with equal diligence.

JOB	CLASS	TYPEWRITING
		Manual Typewriter
		Electric Typewriter
		Selectric Typewriter
		Executive Typewriter
		Magnetic tape selectric (MTST)
		Flexowriter
		Vari-typist
		Business letters
		Printed forms, invoices - pur. orders
		Legal papers and documents
		Financial statements
		Carbon copies
		Proofreading
		Cards, envelopes, labels
		Memorandums and bulletins
		Manuscripts and/or reports
		Form letters and fill-ins
		Tabulated, statistical data
		From rough draft or unarranged data
		Material for duplication (specify)

JOB	CLASS	RECEPTIONIST
		Greet visitors
		Maintain log of visitors
		Give information to callers
		Schedule appointments
		Operate switchboard
		Place telephone messages where employer/co-workers will see them
		Make trip reservations for employer
		Prepare itinerary for employer trips
		Keep daily attendance of employees

JOB CLASS

CLERICAL

- ____ Revise and assemble catalogs
- ____ Look up names and addresses
- ____ Collate material (assemble and staple)
- ____ Compile simple periodic reports
- ____ Revise stock lists
- ____ Take inventory
- ____ Time cards - recording, etc.
- ____ Proofread copy
- ____ Prepare requisitions
- ____ Check on supplies (for re-ordering)
- ____ ________________________
- ____ ________________________
- ____ ________________________
- ____ ________________________

MACHINE OPERATION

- ____ Ten-key adding listing machine
- ____ Ten-key printing calculator
- ____ Full-key adding listing machine
- ____ Rotary calculator
- ____ Electronic calculator
- ____ Bookkeeping machine
- ____ Transcribing machine
- ____ Communication equipment
- ____ Stencil duplicator (mimeograph)
- ____ Fluid or spirit duplicator
- ____ Offset duplicator
- ____ Photocopy machine
- ____ ________________________
- ____ ________________________
- ____ ________________________
- ____ ________________________

FILING

- ____ Sort materials for filing
- ____ File by number, names, or dates
- ____ Retrieve materials from files
- ____ Handle cross references
- ____ Keep card indexes
- ____ Revise files
- ____ Make folders and labels for files
- ____ Use microfilming equipment
- ____ ________________________
- ____ ________________________
- ____ ________________________
- ____ ________________________

JOB CLASS

COMPUTING AND ACCOUNTING

- ____ Use fundamental processes of arithmetic
- ____ Compute trade and cash discounts
- ____ Compute amount and percent of markup or loss
- ____ Compute sales tax
- ____ Figure extensions
- ____ Decide charges on work done
- ____ Make out credit memos and invoices
- ____ Make journal entries
- ____ Post entries from journals to ledgers
- ____ Make entries directly to accounts
- ____ Work with subsidiary ledgers
- ____ Prepare trial balance
- ____ Prepare worksheets
- ____ Prepare profit and loss statement
- ____ Prepare adjusting and closing entries
- ____ Close ledger accounts
- ____ Record time clock data on payroll forms
- ____ Compute payrolls for employees
- ____ Calculate deductions (FICA, etc.)
- ____ Maintain individual earnings records
- ____ Write checks for payroll
- ____ Perform recordkeeping tasks
- ____ Prepare monthly statements
- ____ ________________________
- ____ ________________________
- ____ ________________________
- ____ ________________________

MAILING

- ____ Pick up mail (leave desk to obtain)
- ____ Sort mail (for different persons)
- ____ Open mail
- ____ Stamp and log incoming mail
- ____ Sort mail (in priority order)
- ____ Forward or distribute mail
- ____ Address letters, packages, etc.
- ____ Mark, attach, or enclose materials for outgoing mail
- ____ Fold, insert, and seal mail
- ____ Calculate postal rates
- ____ Take mail to mailroom or mailbox
- ____ Keep postage meter record
- ____ Make up mailing lists
- ____ Stuff, bundle, sort, and/or label outgoing bulk mail
- ____ ________________________
- ____ ________________________
- ____ ________________________
- ____ ________________________

SHORTHAND

JOB	CLASS	
		Take dictation from one person
		Take dictation from more than one person
		Take group proceedings and/or conferences
		Take reports in shorthand
		Transcribe notes in rough draft
		Transcribe notes in final form
		Take dictation over the telephone

DATA PROCESSING

JOB	CLASS	
		Keypunch
		Sorter
		Verifier
		Reproducer
		Interpreter
		Collator
		Tabulator
		Board wiring
		Program cards
		Computer operations training

OTHER

JOB	CLASS	

By: ______________________________
Training Station Sponsor

____
Teacher-Coordinator

____
Parent or Guardian

____
Student-Trainee

APPENDICES Q THROUGH S

APPENDIX Q -- COE JOB INFORMATION FORM

APPENDIX R -- COE WEEKLY TRAINING STATION REPORT

APPENDIX S -- STATEMENT OF EARNINGS REPORT

APPENDIX Q

COOPERATIVE OFFICE EDUCATION JOB INFORMATION FORM

Student Employee	Date Employment Began
Name of Firm	Firm Phone Number
Firm Address	Personnel Manager
ZIP	Your Supervisor at Work

Summary of Job:

Number of Student Learners	Hours of Work Per Week

Rate of Pay

Work Schedule: (Hours worked each day)	Duties: Comments
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	

Student-Learner - Signature	Date

APPENDIX R
COOPERATIVE OFFICE EDUCATION

WEEKLY TRAINING STATION REPORT

Student-learner ______________________

For week ending ______________________

1. What were your responsibilities on the job this week?

2. What did you learn in class that you applied on the job?

3. What new knowledge or skill did you learn on the job?

4. What mistakes did you make on the job? - What did you do to correct them?

5. What could you do in class to help you do a better job at work?

6. Briefly describe the "highlight" of the week - an interesting or challenging relationship with a fellow worker, client, or job sponsor.

SUMMARY OF TIME AND EARNINGS

Date	Check-in Time	Check-out Time

Total hours worked ______

Gross earnings ______

Deductions:

Social Security ______

Withholding ______

(Less) Total Deductions ______

Net Pay - - - - ______

APPENDIX S
STATEMENT OF EARNINGS REPORT

Name ______________________________

Soc. Sec. No. _____/____/_____

Employer ______________________________

Job Title ______________________________

Employer's Address ______________

OE Code ______________________________

Employer's Telephone ____________

Starting Date __________________

Immediate Supervisor ____________

Rate of Pay _____________________

Work Permit No. __________________

Pay Intervals ___________________

Date of Payment	Total Earnings
Summer, 19____	$______________
September ____	______________
____	______________
____	______________
October ____	______________
____	______________
____	______________
November ____	______________
____	______________
____	______________
December ____	______________
____	______________
____	______________

SUBTOTAL for 19___ $______________
(Should equal W-2 form)

Date of Payment	Total Earnings
January _____	$______________
_____	______________
_____	______________
February _____	______________
_____	______________
_____	______________
March _____	______________
_____	______________
_____	______________
April _____	______________
_____	______________
_____	______________
May _____	______________
_____	______________
_____	______________

SUBTOTAL for 19___ $______________

TOTAL ANNUAL EARNINGS $______________

LEGAL RESPONSIBILITIES

Page

LEGAL GUIDELINES C-1

State Child Labor Laws C-2

Federal Regulations C-3

APPENDIX

A. Application for Authorization to Employ a Student-Learner at Subminimum Wages C-4

LEGAL GUIDELINES

It is necessary for the coordinator to be familiar with the legal considerations related to program operation. Guidelines for the teacher-coordinator are listed below.

1. Bias by the teacher-coordinator, administrators and participating employers, on grounds of race, color, national origin, sex, and handicap is prohibited.

2. Discrimination is prohibited in admission, recruitment, treatment of students, financial and employment practices, non-academic services, and health, welfare, and social services.

3. All information handled regarding students should be kept confidential.

4. The teacher-coordinator is expected to inform administrators and participating employers when they may be violating regulations.

5. The teacher-coordinator should discontinue the cooperative arrangement and seek another training station for the student if the employer does not comply with the law.

6. Employers participating in cooperative education programs are eligible for tax credits through the Targeted Jobs Tax Credit (TJTC) established by the Revenue Act of 1978 (P.L. (95-600). The 16- through 18-year-old cooperative education students are included in this group. More information for TJTC should be obtained from the

   Office of Employment Security
   P. O. Box 44094
   Baton Rouge, LA 70804
   Attention: TJTC

7. The coordinator must be familiar with state child labor laws and the minimum wage laws that govern the employment of student workers and minors. It is also the coordinator's responsibility to make certain that the employer in the training station is familiar with this information and that the minimum age for student-learners in the COE Program is 16 years. (The state laws which apply to COE is found at the end of this division.)

8. It is necessary for the coordinator to be familiar with federal regulations that relate to the employment of minors. (The federal regulations which apply to COE is found at the end of this division.)

If additional information is needed concerning state or federal regulations, contact the following offices:

State:
Louisiana State Department of Labor
5360 Florida Blvd.
Baton Rouge, LA 70806
(504) 925-4294

Federal:
U.S. Department of Labor
Employment Standards Administration
Wage and Hour Division
555 Griffin Square Building
Griffin and Young Streets
Dallas, TX 75202

State Child Labor Laws

Minors shall not be employed, permitted or suffered to work:

1. in oiling, cleaning, or wiping machinery or shafting, or in applying belts or pulleys.
2. in or about any mine or quarry.
3. in or about places where stone cutting or polishing is done.
4. in or about any plant manufacturing explosives or articles containing explosive components, or in the use or transportation of the same.
5. in or about iron or steel manufacturing plants, ore reduction works, smelters, foundries, forging shops, hot rolling mills, or in any other place in which the heat treatment of metals is done.
6. in the operation of machinery used in the cold rolling of heavy metals, or in operation of power-driven machinery for punching, shearing, stamping, bending, or planing metals.
7. in or about sawmills or cooperage stock mills.
8. in the operation of power-driven woodworking machines, or off-bearing from circular saws.
9. in logging operations.
10. as driver of any motor vehicle used for commercial or industrial purposes.
11. in the operation of passenger or freight elevators or hoisting machines.
12. in spray painting or in occupations involving exposure to lead or its compounds, or to dangerous or poisonous dyes and chemicals.
13. in any place or establishment in which alcoholic beverages are served or sold for consumption on the premises, or in which such beverages are manufactured or bottled.
14. in any other place of employment or in any occupation that the commissioner of labor shall, after a public hearing thereon, determine hazardous or injurious to the life, health, safety or welfare of such minors.

15. no minor shall be employed, permitted, or suffered to work for more than five hours continuously without an interval for meals. Such interval shall be included as part of the working hours of the day and in no case shall this interval be reduced to less than thirty minutes.

It is no longer required that students employed through an approved cooperative program obtain a work permit.

A copy of the Cooperative Part-time Training Memorandum (Plan) must be completed jointly by the coordinator and the on-the-job supervisor. The employer must keep a copy on file to meet the requirements of the Louisiana Department of Labor.

Federal Regulations

1. If students are paid the minimum hourly wage (or more), no student-learner permit is required, and he may work any number of hours under the Federal Regulations.

2. A student-learner may be employed at subminimum wages. Minimum wage to be paid must be not less than 75 percent of current minimum wage. An employer must submit an APPLICATION FOR AUTHORIZATION TO EMPLOY A STUDENT-LEARNER AT SUBMINIMUM WAGES. (Appendix A) Guidelines for this application are:

    a. Minimum age for the student-learner is 16 years
    b. The number of hours of employment training each week at subminimum wages, when added to the hours of school instruction shall not exceed 40 hours except:

        (1) when school is not in session on a school day, the student-learner may work up to eight hours in addition to the weekly hours authorized.
        (2) during the school term, when school is not in session for the entire week, the student-learner may work a number of hours in addition to those authorized provided that the total hours shall not exceed 40 hours in any such week.

3. The student-learner must have or must secure a Social Security account number.

U.S. Department of Labor
Employment Standards Administration
Wage and Hour Division
555 Griffin Square Building
Griffin and Young Streets
Dallas, TX 75202

Form Approved
Budget Bureau No. 44-R0394

WAGE HOUR USE ONLY

A Control number ______________

B Effective date ______________

C Expiration date ______________

D Reviewing official ______________

APPLICATION FOR AUTHORIZATION TO EMPLOY A STUDENT-LEARNER AT SUBMINIMUM WAGES

The school official's certification in Item 27 of this application provides temporary authority to employ the named student-learner under the terms proposed in the application which are in accordance with section 3(c) of the Student-Learner Regulations (29 CFR 520). The authority begins on the date the application is forwarded to the Division. At the end of 30 days, this authority is extended to become the approved certificate unless the Administrator or his authorized representative denies the application, issues a certificate with modified terms and conditions, or expressly extends the period of review. Note that the certificate is valid for no more than 1 school year and does not extend beyond the date of graduation.

READ CAREFULLY THE INSTRUCTIONS FOR COMPLETING THIS FORM. *PRINT OR TYPE ALL ANSWERS.*

1 NAME AND ADDRESS, INCLUDING ZIP CODE, OF ESTABLISHMENT MAKING APPLICATION

2 TYPE OF BUSINESS AND PRODUCTS MANUFACTURED, SOLD, OR SERVICES RENDERED:

5 PROPOSED BEGINNING DATE OF EMPLOYMENT (*Month, day, year*)

6 PROPOSED ENDING DATE OF EMPLOYMENT (*Month, day, year*)

7 PROPOSED GRADUATION DATE (*Month, day, year*)

8 NUMBER OF WEEKS IN SCHOOL YEAR

9 TOTAL HOURS OF SCHOOL INSTRUCTION PER WEEK

10 NUMBER OF SCHOOL HOURS DIRECTLY RELATED TO EMPLOYMENT TRAINING

11 HOW IS EMPLOYMENT TRAINING SCHEDULED (*Weekly, alternate weeks, etc.*)?

12 NUMBER OF WEEKS OF EMPLOYMENT TRAINING AT SUBMINIMUM WAGES

13 NUMBER OF HOURS OF EMPLOYMENT TRAINING A WEEK

14 ARE FEDERAL VOCATIONAL EDUCATION FUNDS BEING USED FOR THIS PROGRAM?

15 WAS THIS PROGRAM AUTHORIZED BY THE STATE BOARD OF VOCATIONAL EDUCATION?

16 IF THE ANSWER TO ITEM 15 IS "NO" GIVE THE NAME OF THE RECOGNIZED EDUCATIONAL BODY WHICH APPROVED THIS PROGRAM

3A NAME AND ADDRESS OF STUDENT-LEARNER:

B DATE OF BIRTH: (*Month, day, year*)

4 NAME AND ADDRESS, INCLUDING ZIP CODE, OF SCHOOL IN WHICH STUDENT-LEARNER IS ENROLLED:

17 TITLE OF STUDENT-LEARNER OCCUPATION:

18 NUMBER OF EMPLOYEES IN THIS ESTABLISHMENT

19 NUMBER OF EXPERIENCED EMPLOYEES IN STUDENT-LEARNER'S OCCUPATION

20 MINIMUM HOURLY WAGE RATE OF EXPERIENCED WORKERS IN ITEM 19

21 SUBMINIMUM WAGE(S) TO BE PAID STUDENT-LEARNER (*If a progressive wage schedule is proposed, enter each rate and specify the period during which it will be paid*):

22 IS AN AGE OR EMPLOYMENT CERTIFICATE ON FILE IN THIS ESTABLISHMENT FOR THIS STUDENT-LEARNER? (*If not, see instructions*)

23 IS IT ANTICIPATED THAT THE STUDENT-LEARNER WILL BE EMPLOYED IN THE PERFORMANCE OF A GOVERNMENT CONTRACT SUBJECT TO THE WALSH-HEALEY PUBLIC CONTRACTS ACT OR THE SERVICE CONTRACT ACT?

ATTACH SEPARATE PAGES IF NECESSARY

Form WH-205 (Rev. 10/70)

24 OUTLINE THE SCHOOL INSTRUCTION *directly* RELATED TO THE EMPLOYMENT TRAINING *(list courses, etc.)*.

25 OUTLINE TRAINING ON-THE-JOB *(describe briefly the work process in which the student-learner will be trained and list the types of any machines used).*

26 SIGNATURE OF STUDENT-LEARNER:

I have read the statements made above and ask that the requested certificate, authorizing my employment training at subminimum wages and under the conditions stated, be granted by the Administrator or his authorized representative.

(Print or type name of student)

Signature of Student

Date

27 CERTIFICATION BY SCHOOL OFFICIAL:

I certify that the student named herein will be receiving instruction in an accredited school and will be employed pursuant to a bona fide vocational training program, and that the application is properly executed in conformance with section 520.3(c) of the Student-Learner Regulations.

(Print or type name of official)

Signature of School Official

Date

Title

28 CERTIFICATION BY EMPLOYER OR AUTHORIZED REPRESENTATIVE:

I certify, in applying for this certificate, that all of the foregoing statements are, to the best of my knowledge and belief, true and correct.

(Print or type name of employer or representative)

Signature of employer or representative

Date

Title

ATTACH SEPARATE SHEETS IF NECESSARY

ADVISORY COMMITTEE

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THE ADVISORY COMMITTEE

The establishment of an Advisory Committee is mandated by the Vocational Education Act of 1963 as amended in 1976 in order to receive federal funding. The purpose of an Advisory Committee is to advise the teacher-coordinator in planning and implementing the Cooperative Office Education program.

Functions of the Advisory Committee

The teacher-coordinator may ask the Advisory Committee to perform such functions as:

1. Review goals and objectives of the COE program.
2. Disseminate information about the program to the local business community.
3. Evaluate the COE course content to determine the vocational relevancy of the program as it relates to the employment needs of the business community.
4. Recommend ways to correlate in-school and on-the-job instruction.
5. Present local employment opportunities and job requirements.
6. Assist in locating training stations.
7. Serve as a resource person to vocational classes.
8. Suggest and aid in securing up-to-date classroom materials and equipment.

Recommendations

The following points should be kept in mind in establishing and using the Advisory Committee.

1. Members may be selected from the following areas:
    - a. Business and industry
    - b. Governmental agencies
    - c. Professional organizations
    - d. News media
    - e. Civic organizations
    - f. School personnel

2. Members should serve for staggered terms in order to provide for experienced membership on the committee at all times.

3. The committee should be chaired by a non-school person with the teacher-coordinator serving as secretary.

4. Two or three formal meetings per year should be sufficient. Meetings should be called only when a planned agenda justifies such meetings.

PUBLIC RELATIONS

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PUBLIC RELATIONS

The Cooperative Office Education teacher-coordinator has a unique opportunity to be the public relations person for the COE program, for the school, for the parish, and for the State Department of Education. It is important for the teacher-coordinator to be a master teacher, an excellent coordinator, and a positive, aggressive promoter of cooperative education.

A good public relations program is based on a sound, efficiently conducted program that produces a good product--the well trained worker. The COE program is one of the few educational programs where immediate judgments are tied directly to the product it produces. A satisfied employer, a well-informed school board member, an administrator, a supervisor will promote good public relations for COE.

PUBLIC RELATIONS ACTIVITIES

General Activities

Various groups contribute to the general public impression of COE--personnel at training stations, members of civic and professional groups, parents, students, counselors, teachers, administrators, and state department personnel. What these people say about COE will determine the general public's impression of the program. Listed below are ideas related to the various groups that help form the impression of COE:

1. Employers and training station supervisors should be involved in the program. Their participation in program planning, advisory committees, evaluation, and public relations activities keeps them informed and further develops an understanding of their role in the educational process.
2. Employers and training station supervisors may be used as guest speakers in the COE and other business education classes.
3. Good, clear lines of communication with training station supervisors are important. Frequent personal visits are important; written communication in the form of a newsletter informs the employer of what is happening in the local COE programs.
4. The teacher-coordinator's involvement in community civic groups is valuable to the publicity of the program.
5. Opportunities for the teacher-coordinator to speak before civic and professional groups about the COE Program promote goodwill and expand the public's knowledge of the program.

6. Meetings with parents, home visits, direct mail, articles in the school and local newspapers, and personal contacts are means of keeping parents informed of the educationally sound and socially accepted programs.

7. The teacher-coordinator should keep the administration informed of student achievements, placements, evaluations, and other program activities. They may be invited to observe students at work.

8. The greatest public relations contribution by the student is the efficient day-to-day performance on the job with a good attitude.

9. Students can participate in public relations through presentations at meetings, student organizations, and through preparation of informative bulletin boards and displays. National Vocational Education Week is an ideal time for these activities.

10. The teacher-coordinator must keep the entire faculty informed about the values of the program. Communication with faculty through formal meetings, printed materials, and day-to-day informal contacts is helpful.

11. Guidance counselors and coordinators should be members of a team from the start. Day-to-day contacts make counselors realize that their opinions and assistance are important.

12. Counselors can identify prospective students to coordinators. Involve the counselors in the end-of-year appreciation activity.

13. The teacher-coordinator should use a positive approach when communicating with guidance counselors, faculty, and administrators.

14. The State Department of Education is interested in knowing what is happening in COE in the field. They should be kept informed of any unique or new ideas and activities used in the program. A local newsletter is a perfect medium for communicating.

Specific Activities

Public relations does not begin or end with a specific activity. A well-planned program must be continuous throughout the year. The success of the public relations effort relies heavily on the ability of the teacher-coordinator to keep the public informed. Specific coordination activities involving public relations include the following:

1. Plan and present a school assembly program to acquaint students with the COE program.

2. Explain details of COE program to school board at request of superintendent.

3. Prepare bulletin boards and other displays about COE. Use bulletin boards in rooms of other teachers as well as those in the main halls.

4. Meet with professional groups and trade unions to explain COE program.

5. Confer with guidance department about methods of publicizing program to students.

6. Speak at civic and professional meetings about COE program when invited.

7. Prepare and distribute pamphlets and bulletins (Appendices A and B) about COE program.

8. Prepare and distribute teacher-coordinator's business card (Appendix C)

9. Solicit advisory committee's assistance in publishing information about program.

10. Publish a newsletter (Appendix D) regularly to provide information and news about the program.

11. Advertise program in newspapers and on radio and television.

12. Sponsor an "open house" for employees, teachers, and parents. The open house might be held in connection with a school holiday, such as Thanksgiving, Christmas, etc.

13. Visit junior high schools to give slide presentations, make orientation talks, etc. Use successful students to assist.

14. Conduct an orientation session for parents of COE students.

15. Meet regularly with administrators to keep them informed about program happenings.

16. Plan a public relations calendar and keep up to date.

17. Use holidays and special occasions to remember training station supervisors--birthday cards, Thanksgiving baskets, etc.

18. Sponsor an employer appreciation function--breakfast, luncheon, banquet, etc.--at the end of the school year. Samples of invitations and programs are provided at the end of this section. (Appendices E, F, and G)

19. Present a framed certificate of appreciation to training station sponsors and student-trainees at the end of the school year. (Appendices H, I, and J)

20. Invite program graduates to speak to students about their success.

21. Solicit advice and recommendations from fellow teachers.

22. Invite training station sponsors to spend a day (one or more class periods) at school to view related instruction.

23. Develop a slide, slide/sound, or motion picture story of COE program.

24. Create a traveling display case of classroom work for exhibition in businesses.

25. Exhibit students' work at school board and other meetings.

26. Arrange tours of classroom facilities for prospective students.

27. Honor outstanding students at school assemblies.

28. Have photography class or yearbook photographer take pictures of students at their job stations.

PROGRAM PROMOTION

Newspapers/Periodicals

Preparation of news releases. A news release should include the who, what, when, where, how, and why of events reported. A headline should be included. Be sure to include at the top of the page the date, the teacher-coordinator's name, and the telephone number.

Guidelines. When submitting information for publication, keep the following guidelines in mind:

1. Be sure to meet all deadlines.
2. Know the proper contact person; use appropriate channels.
3. Be sure to include all pertinent information in the news release.
4. Type the news release; proofread carefully.
5. Be accurate; check dates, time, names, etc.
6. Be brief.
7. Be honest and impartial. Do not overrate the program.
8. Maintain a businesslike relationship.
9. Be sure to express appreciation for space allowed.
10. Give credit to students, school, or employer.
11. Keep a scrapbook of news stories.
12. Post copies of published articles on bulletin boards in classroom and around the school.

Photographs for publication. If possible, include a photograph with the news release. Keep the following guidelines in mind when submitting a picture:

1. Use a glossy, black-and-white picture; inquire about acceptable size.
2. Attach paper showing caption with scotch tape (do not use staples or paper clips which might damage the picture).
3. Use an action shot if possible.
4. Be sure names of individuals in picture are in proper order and spelled correctly.

Radio/Television

Radio and television stations are required to allot time for public service announcements (PSA). The teacher-coordinator should take advantage of this opportunity to publicize the COE program. The following "spot" announcements might be adapted for use as a PSA promoting the COE program:

> Employers! You have always supplied the fringe benefits. It's time you got one. Your local high school is proud to present: Cooperative Office Education--COE. COE is the chance for you to hire student employees--trained, motivated individuals--whose only desire is to work productively. They will work for you, learn from you, and you will save both money and hassles. Employers, it's your turn--cash in on the benefits. Call the COE office at your local high school or the vocational supervisor at the (name of parish) school board at (telephone number).

> Employers! Succeeding in business is a gamble. At a time when the economy is stacking the odds against you, you need to consider hiring a Cooperative Office Education student. COE can help your business operate economically and efficiently. COE provides you with trained, highly motivated employees. They will learn from you and earn for you. It's a good bet. Call the COE office at your local high school or the vocational supervisor at the (name of parish) school board at (telephone number).

> Employers! Do you sometimes get the feeling that your employees are "shopping around"--that employees "try you on" and then leave? It's frustrating, and it costs you in time, money, and effort. Well, here's a break: Cooperative Office Education, (COE) brings you prospective employees--trained, motivated, high school seniors who will learn from you and earn for you. COE fits employees to your needs. You do the evaluating; you reap the benefits. Call the COE office at your local high school or the vocational supervisor at the (name of parish) school board at (telephone number).

> Mr. Businessman! Do you need a part-time office worker--someone to answer the phone or file while your secretary uses her skills for more demanding tasks. Perhaps you need someone to help with routine typing assignments. Consider hiring a Cooperative Office Education (COE) student from one of your local high schools. COE can help you with your work overload and at the same time provide valuable, supervised work experience for skilled high school seniors. Through the COE program, students attend classes during the mornings and work in local offices during the afternoons. Call the COE office at your local high school or the vocational supervisor at the (name of parish) school board at (telephone number).

In addition, some stations have local talk shows which are aimed at keeping the community informed of local activities. The teacher-coordinator may be able to arrange for an on-the-air interview. If such an interview is possible, the following list of questions are recommended for presentation:

1. What is Cooperative Office Education (COE)?
2. How does a COE program operate?
3. What other subjects do the students take while in the program?
4. Who is eligible to participate in the COE program?
5. How are students selected?
6. How many credits may be earned?
7. Are the students paid while taking their on-the-job training?
8. What are some of the advantages or benefits of the program?
9. What training is required of the teacher-coordinator?
10. How many schools offer the COE program?
11. What are the plans for expanding COE opportunities?
12. What student organizations are involved in COE?

Public Appearances

Presenting the COE story to a group requires skill and practice. The presentation should be well-planned and interesting. Below are suggestions for making speeches:

1. Dress in professional business apparel.
2. Be direct and straightforward.
3. Put audience at ease by being at ease yourself.
4. Know subject matter and speak with authority.
5. Concentrate on communicating the idea and ideals of COE.
6. Speak clearly in the language of the audience.

7. Keep personal accomplishments out of the speech as much as possible.

8. Develop an outline that is easy to follow.

9. Have a good beginning and ending for presentation.

10. Prove points with human illustrations.

Other Promotional Methods

Visuals:

- Filmstrips
- Slides
- Displays/exhibits
- Posters
- Bulletin boards
- Photographs
- Charts
- Transparencies
- Video tapes
- Scrapbook

Special Events:

- Career Day
- Business and Industry Day
- Vocational Education Week
- Open house
- Field trips
- FBLA district and state conferences
- Training sponsor events
- Employer appreciation activity
- Courtesy campaign
- Fair
- Coffees/teas
- Programs for parents

Miscellaneous Publications:

- School newspaper
- Club magazines/bulletins
- Newsletter
- Trade journals
- Educational magazines
- Mailings
- Pamphlets/brochures
- School yearbook
- Handbills

Awards and Special Recognition:

- Certificates, students
- Certificates, employers
- Trophies/plaques
- Special recognition awards
- Employer-of-the-Month Award
- Employee-of-the-Month Award
- Employer-of-the-Year Award
- Employee-of-the-Year Award
- Appreciation awards

Speeches/Demonstrations by Students or Teacher-Coordinator to:

- Civic groups
- Service groups
- Business/professional groups
- PTA or other parent group
- Student groups
- Faculty

Active Participation by the Teacher-Coordinator:

- Professional organizations
- Trade associations
- Civic organizations
- Student organizations
- Chamber of Commerce
- Community activities

Miscellaneous:

- Billboards
- Bumper stickers
- Personal contacts
- Business cards
- Student organization projects
- Business ads illustrating students at work
- Yearbook ads illustrating students at work
- Industry participation stickers
- Public Information Sub-Committee of Advisory Committee
- Employment consulting
- Business consulting

Personal Letters. Form letters may be created to cover different occasions that arise repeatedly. The same letter may be used periodically with some revision from time to time. Some suggestions for letters are:

1. Informative letters to congressmen and state legislators relative to current issues important to vocational education.

2. Invitations to parents, school administrators, and/or business leaders to attend various functions at the school, including the employer appreciation activity.

3. "Thank You" letters to individuals and businesses who have contributed to the success of the program.

4. Promotion letters to students, parents, and businesses.

5. Congratulatory letters for any special recognition received by student, parent, or employer.

EMPLOYER APPRECIATION ACTIVITY

At the end of the school year, it is appropriate to recognize and show appreciation for the employers who have worked with the COE students during the year. Everyone likes to be appreciated and acknowledged. There are many activities that are appropriate from the very formal to the very casual.

1. Formal banquet
2. Dinner theatre
3. Luncheon
4. Breakfast
5. Barbeque
6. Crawfish or seafood boil

Goals

The appreciation event is used to achieve several goals. Whether the event is a banquet or a casual event, it should reflect these goals:

1. To show appreciation to the business community for working with students.
2. To provide for student leadership in planning such an event.
3. To acquaint individuals with the scope of COE.
4. To enable the school administration and faculty to continue relationships with those employers working with COE.
5. To recognize outstanding contributions.
6. To recognize student leadership.
7. To develop group spirit and pride

Guidelines

The following guidelines should be kept in mind in planning and conducting the employer appreciation activity:

1. Involve students in all phases of planning and executing of the event.

2. Develop a long-range plan for financing the event.
3. Keep the superintendent, principal, vocational sponsor, and other school authorities informed of the event.
4. Create attractive and appropriate invitations.
5. Greet guests appropriately.
6. Use name tags to help guests get acquainted.
7. Plan a varied program that moves fast. Set a schedule and follow it.
8. Keep a file on employer appreciation activities.
9. Publicize the activity before and after presentation. Take pictures during the event.
10. Honor all employers with framed certificates or other appropriate awards.
11. Honor students appropriately.
12. Present special recognition awards to selected employers and students.

APPENDICES A AND B

COE PAMPHLETS

APPENDIX A
Example of a Pamphlet for Prospective Employers

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WHAT IT IS

COOPERATIVE OFFICE EDUCATION is a program of instruction in stenographic, clerical, data processing, or bookkeeping skills which trains students in careers in these fields. It is a partnership between the school, the student, and a local businessman.

STUDENT TRAINEES attend school part-time and receive supervised work experience under actual working conditions for wages.

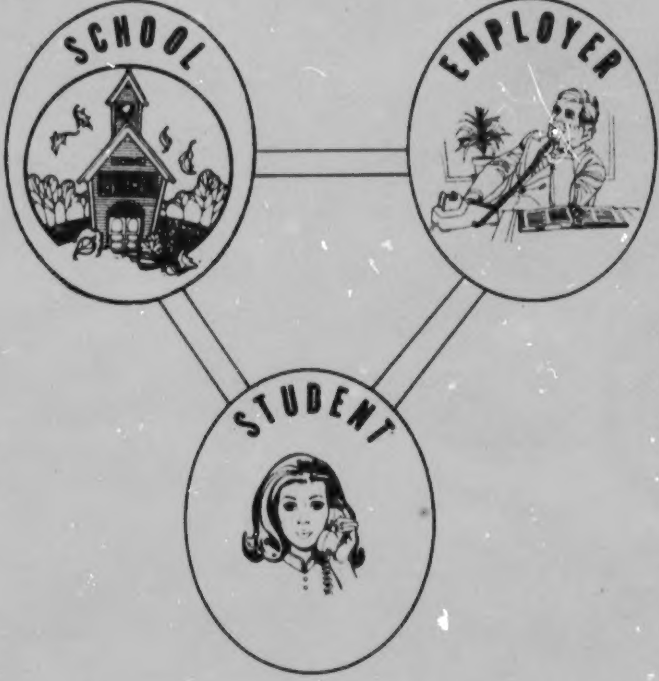
TRAINING ESTABLISHMENTS are local business firms.

RELATED CLASSROOM INSTRUCTION is designed to correlate business experience with school learnings.

TEACHER-COORDINATOR is the connecting link between the school and the local business. The teacher-coordinator is an experienced office worker.

YOUR COOPERATIVE OFFICE EDUCATION COORDINATOR IS AT YOUR SERVICE

FORM A PROFITABLE PARTNERSHIP



COOPERATIVE OFFICE EDUCATION
East Baton Rouge Parish

THE EMPLOYER

- *Agrees to employ a student of his choice
- *Cooperates with teacher-coordinator
- *Assists in determining wages and hours student will work
- *Assists coordinator with a written training plan for the student
- *Makes periodic evaluations of the student's progress
- *Determines policy by serving on the advisory committee when requested
- *Assists student in planning future career and training

THE TEACHER COORDINATOR

- *Provides related learning experience in the classroom
- *With assistance of employer determines the training plan for the student
- *Makes regular visits to the training station to observe the student and to confer with supervisor
- *Coordinates the objectives of business and office education with needs of local businessmen
- *Fits job assignment to student's career objective
- *Keeps complete records concerning student and his performance

THE C.O.E. STUDENT

- *Is a loyal, mature employee eager to learn
- *Accepts criticism as an aid to learning
- *Has a career objective in the business and office education field
- *Maintains an excellent attendance record on the job and at school
- *Conforms to the appearance standards set by the employer and the school
- *Knows the value of human relations in dealing with fellow employees
- *Brings any problems to coordinator and/or employer

BECOME A COOPERATIVE OFFICE EDUCATION TRAINING SPONSOR

APPENDIX B
Example of a Pamphlet for Prospective Employers

TEACHER COORDINATOR'S RESPONSIBILITIES

Provides related learning experiences in the classroom.

Coordinates with employer, and/or training station supervisor on the job, about a training program agreement for each student.

Visits the student-trainee periodically on-the-job.

Discusses overall policies with the employer.

Reviews the student's progress with the training station supervisor.

Acquaints students with occupational opportunities and requirements in the field of business. Helps develop training standards. Maintains harmonious relationships with various community organizations.

Interprets accurately and clearly the objectives of the cooperative office education program.

Works with school principal and faculty members in organizing related classes.

Confers with persons interested in cooperative office education.

TO

Cooperative Office Education

A Cooperative Vocational
Education Program
sponsored by the
Terrebonne Parish School Board
through
H.L. Bourgeois High School
South Terrebonne High School
and
Terrebonne High School

EMPLOYER'S RESPONSIBILITIES

Understands and accepts the Cooperative Office Education Program.

Interviews and hires or rejects applicants sent by the school. Explains company policies and rules.

Agrees to employ a student-learner for the entire school year.

Provides diversified and supervised work experience. Has a personal interview periodically with the student.

Complies with State and Federal regulations concerning Fair Labor Standards.

Assists in affecting the transition from student to employee.

Calls the coordinator for aid in adjusting major problems. Notifies the coordinator before dis—charging a student.

Evaluates progress of each student-trainee periodically.

WHAT IS COOPERATIVE OFFICE EDUCATION?

Cooperative Office Education is a vocational business education program for high school seniors who plan a career in clerical work. It is designed to affect the transition from student to employee through a combination of classroom instruction and actual experience in the laboratory of the business world.

The student attends school in the morning and receives on-the-job training in an office during the afternoon.

Each student trainee receives three units of credit for the successful classroom and job performance. In addition, he is paid a minimum wage in the training status period.

C.O.E. is taught by a qualified teacher-coordinator who is aware of the needs of both the businessman and the student-learner.

A successful Cooperative Office Education Program is the result of cooperative participation by the school, the employer, the parent and the student.

STUDENT'S RESPONSIBILITIES

Is a loyal employee in the business in which he is working. Is honest, dependable, and willing to accept responsibility.

Keeps a good attendance record in the office and in school.

Notifies coordinator and employer of anticipated absence.

Is clean, neat and dressed to meet the requirements of the job.

Is courteous and considerate of others. Has a harmonious working relationship with business personnel and employees.

Accepts criticism as an aid to learning.

Develops good work habits. Is interested, alert and accurate.

Is a high school senior, in good health, and at least 16 years of age.

Provides own transportation to and from work.

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APPENDIX C

TEACHER-COORDINATOR BUSINESS CARDS

APPENDIX C

Examples of Business Card of Teacher-Coordinator

MILDRED ANN HENRY
Coordinator

COOPERATIVE OFFICE EDUCATION
Baker High School

3200 Groom Road . Baker, LA 70714 . (504) 775-1119
or 775-1259

H. L. BOURGEOIS
HIGH SCHOOL

GRAY, LA
70359

MRS. MYRA M. STARR
COOPERATIVE OFFICE EDUCATION
COORDINATOR

SCHOOL OFFICE
872-3277

RESIDENCE
876-3163

ISTROUMA SENIOR HIGH SCHOOL

COOPERATIVE OFFICE EDUCATION
SANDRA E. KING
Coordinator

3730 Winbourne Ave.
Baton Rouge, LA. 70805

C.O.E. Office 355-4900
Main Office 355-7701

APPENDIX D

COE NEWSLETTER

APPENDIX D
Example of a Parish Newsletter

COE
NEWSLETTER
EAST BATON ROUGE PARISH

Volume I December, 1981 Number 2

STATE SUPERINTENDENT COMMENDS COE PROGRAMS

Cooperative Office Education is an excellent program for our students, primarily because it provides on-site work experience. This method of learning and earning is of significant tangible value. In work places throughout the state, students are able to make realistic occupational decisions and choices. There is no better way to integrate classroom experience and practical work application.

As Superintendent of Education, I commend this program and all of its participants and coordinators. Keep up the good work!

J. Kelly Nix
State Superintendent of Education

STATEMENT BY ASSISTANT SUPERINTENDENT OF EDUCATION

Vocational education in Louisiana is a vast complex of interrelated occupational areas. Having been a high school principal for a number of years, I am most appreciative of the contributions that COE makes to the total program of vocational education. It is through cooperative training that students are able to explore career opportunities and learn an occupation that, in many instances, leads to a lifetime of productive employment.

We, of the Department of Education, will continue to place a high priority on Cooperative Office Education and will expand our efforts to offer technical assistance to the local education agencies where needed.

Again, may I commend you for your efforts.

Dr. N. J. Stafford, Jr.
Assistant Superintendent
Office of Vocational Education

"HEY, MISTER (MRS., MISS, or MS.)...

wanna buy a candy bar or a mug or a Christmas ornament, or greeting cards?"...the list is endless.

Although limited vocational funds are provided for supplies and equipment for COE students, no funds are available for extracurricular activities. Thus, each COE program must include as part of its annual activities some type of fund-raising project. The projects vary, but the common goal is providing funds for the annual employer appreciation function. To all of you who cooperate with our fund-raising projects, we would like to take this means of thanking you--we really appreciate your help.

APOLOGIES TO McKINLEY COORDINATORS

In the September issue of the COE Newsletter, the paragraph listing the present and former coordinators of the McKinley COE program was inadvertently omitted from the article entitled "Growth of Cooperative Office Education in East Baton Rouge Parish."

Mrs. Jeanette Langridge Kaub started the COE program at McKinley in 1970. The following teachers have served as coordinators: Mrs. Avis White, Ms. Carol Borskey, Mrs. Donna Murray, and Mrs. Heather Babin. Mrs. Beleta Bischoff is the present coordinator of the program, beginning her third year with the 1981-82 school term.

MERRY CHRISTMAS
and
HAPPY NEW YEAR
from
The COE Coordinators

THE EMPLOYER'S VIEW . . .

Cooperative Office Education (COE) is a cooperative program between the schools and local businesses. Our uniqueness is the on-the-job training which our students receive. Without the participation of the employer, COE would simply be another business education course. Our goal is to provide a course which is mutually beneficial to the student, the school, and the local business community.

* * * * * *

"I need half a person, or actually a whole person half the time."

Through my years in public accounting practice in Baker I have heard these words many times from my local clients. As a business grows, it needs more workers, but if it is a slow, steady growth, then at a certain point in time, half a person would do fine.

I have recommended hiring a COE student to many of my clients. It is the perfect solution to the problem. The old saying that I would not recommend something to you that I did not use myself is appropriate in this instance. I have used ten COE students over the years. In fact, two of them are still employed by our firm.

I have discovered that the students want to work. This is the most important qualification of all. A person will learn the job if he/she wants to work. The smartest person in the world will not do a good job if he/she does not have the desire to work.

So, if you need half a person to do a job, I recommend a COE student highly.

John D. Butler
Butler & Bryant
Certified Public Accountants

American Bank participates in the East Baton Rouge Parish COE program not only because we can use excellent part-time help, but it plays a very important part in our clerical recruiting program. The retention rate of employees has been 85-90%. One of our Branch Managers came to us as a COE student, worked part-time while attending LSU and is now managing a branch. Also, we have an Assistant Branch Manager who started as a COE student.

Because of the close supervision of the COE coordinators, we have experienced very few problems. The coordinators keep in touch with the immediate supervisor(s) and by doing this they are always on top of any problems that may arise. A COE student is not only taught good clerical skills, but how to dress professionally and a lot of just plain business courtesy.

I personally feel this program is one of the best the public school system has to offer.

Edna Browning
Personnel Officer
American Bank & Trust Company

Our Company began participation in the COE program in 1968. We have employed a total of six (6) girls since that time, and of the six, four are still with us. We were a small organization in 1968 and therefore were able to expend the time training these employees according to our needs and expectations. They, in turn, grew with our organization and to date have moved into executive secretarial positions. By their knowledge of the day-to-day operations, they are able to contribute heavily to make for smoother daily operations.

Tillmon H. Huckeba
Executive Vice President
F. C. Schaffer & Associates, Inc.

Student workers have long been valuable additions to our staffs of Medical Records Departments. Our association with the Tara COE program over the past several years has resulted in productive employee relationships, fostered by sound classroom preparation, and the concern for good performance of the coordinator.

Jean B. Daily, RRA
Director, Medical Records Service
Baton Rouge General Hospital

THE GRADUATE'S VIEW . . .

"As a former student of the COE program, I would like to comment on its value for the office worker. The program provided an excellent opportunity to get started in the business world through a part-time job. The program also provided training in basic office skills necessary for 'on-the-job' experiences. Through sharing office experiences with fellow classmates, I was able to benefit from their ideas and suggestions on the different situations. In my opinion, the COE program is an outstanding way in which a young office/clerical worker can make the transition into the business world."

Marilyn Carpenter
F. C. Schaffer & Associates, Inc.
(Broadmoor COE)

. "I started my career in the Cooperative Office Education class of 1970-71. I had decided to pursue a business career, however, did not intend to go to college. I was placed in a receptionist-typist position through the COE program on a part-time basis for that school year. At the end of that time, I was asked to continue my employment on a full-time basis as a secretary. As the company grew, so did my career. I am presently the office manager of the same corporation.

"Had it not been for the COE program, I would never have been given the opportunity to be trained on the job and gain the experience and knowledge I now have."

Geralyn C. Graphia
F. C. Schaffer & Associates, Inc.
(Broadmoor COE)

"I just wanted to thank you (Mrs. Tull) for all of your work.. with each of us and (for the) time you took to work with our employers to see that we had a good opportunity to learn new things in a business atmosphere. . . There are new things that I learn each day, some from mistakes, and some from watching other people; but the most helpful tool was my COE training."

Trish Coe
IBM Corporation
(Belaire COE)

"Due to the COE program, my life took a turn for the best. I now have job security and a bright future with a firm that is rapidly expanding.

"Because of my on-the-job training, the knowledge I have gained has enabled me to travel extensively, working in various parts of the world such as Central America, Europe and Africa.

"Three cheers for COE!"

Debra L. Blacher
F. C. Schaffer & Associates, Inc.
(Broadmoor COE)

". . .(COE) helps you learn different types of tasks, how to be responsible, and how to work well with others. It also helps you to understand and learn about the business world. COE helped me get the career I wanted."

Glenda McKnight
Louisiana National Bank
(McKinley COE)

"I feel the COE program was very beneficial to me because I was not sure I wanted to go to college. The program got me a job that I probably would not have been able to get as a high school graduate with no office experience."

Sarah Sanders
(Woodlawn COE)

"COE helped me locate my bookkeeping/secretarial job that I have now had for over five years. COE helped me acquire the skills I needed."

Pallas Dedon
Butler & Bryant, CPA's
(Baker COE)

"In my opinion, COE was the most useful course for me in high school."

Melissa Mayeux
(Woodlawn COE)

MANAGEMENT'S MEASURING STICK*

--She looks the part--attractively and tastefully groomed in appropriate business-like attire.

--She is in good health and has a good attendance record.

--Her voice is pleasant and well modulated.

--Her speech is clear, grammatically correct, and expressive.

--Her telephone manner is friendly and courteous, and she is efficient in handling calls for others as well as herself.

--She is punctual.

--She possesses the skills and the ability to undertake more advanced work.

--She is accurate in her work, and careful in such details as proofreading, figuring, and filing.

--She can be counted on to do a job right the first time.

--She can follow instructions and work without constant supervision and direction.

--She can give instructions to others in a clear, logical manner that can be easily understood.

--She is so well liked by all the staff that she receives excellent cooperation from them.

--She has a considerate nature, a pleasant disposition, and an even temperament.

--She has a dignified, business-like demeanor.

--She possesses the social and intellectual polish that enables her to associate easily with all types of people.

--She has the ability to concentrate well.

--She is courteous and tactful even with disagreeable customers and callers.

--She can work well under pressure, keeping her wits and maintaining her poise throughout.

--She can be counted on to keep confidences and to resist gossip.

--She possesses efficient work habits.

--She is watchful for ways to improve work methods or to cut costs.

--She works willingly despite occasional emergencies that might entail overtime.

--She is concerned with the welfare of the company and of its customers.

--She works well alone or as a member of a team.

--She can adjust easily to her superiors.

--She can take criticism calmly and can evaluate it impersonally.

--She is considerate of her employer's time, and tries to relieve him/her of any tasks she can handle.

--She does not let her personal troubles interfere with business.

--She separates business and pleasure to the extent that her social phoning, shopping sprees, hairdressing appointments, and so on, do not infringe on company time.

--She does not let her office socializing get out of bounds.

*Taken from CHARM by Whitcomb and Lang.

DIRECTORY OF COE PROGRAMS AND COORDINATORS

Baker/Mrs. M. Henry. . . .	.775-1119
Belaire/Mrs. R. Tull	.272-9949
Broadmoor/Mrs. J. Kaub . . .	.926-5486
Capitol/Mrs. S. Potts. . . .	.387-0244
Central/Mrs. J. Smith. . . .	.261-5768
Glen Oaks/Mrs. J. White. . .	.355-3771
Istrouma/Miss S. King. . . .	.355-4900
McKinley/Mrs. B. Bischoff.	.343-2150
Lee/Mrs. S. Fleet.	.344-7189
Tara/Mrs. I. Shaw.	.928-0122
Woodlawn/Mrs. R. Almond. . .	.292-4122

* *

Co-editors of the December 1981 issue of the COE Newsletter were Sandra King and Jeannine Smith.

* *

APPENDICES E, F, AND G

COE INVITATIONS AND PROGRAMS FOR AN EMPLOYER APPRECIATION FUNCTION

APPENDIX E

Example of an Invitation to the Employer Appreciation Function

The Istrouma
Cooperative Office Education Class
requests the honor of your presence
at its Employer Appreciation Luncheon
on
Friday, April 23, 1982
12:00 noon
at the Baton Rouge Hilton

Guest of ______________________

R.S.V.P. 355-4900
8 a.m. to 12 noon

APPENDIX F

Example of Program Cover for Employer Appreciation Function

BELAIRE C. O. E.

presents

A TOUCH OF THE OLD SOUTH

Mount Hope Plantation

1980 - 1981

APPENDIX G

Example of a Program for the Employer Appreciation Function

1981-1982

COOPERATIVE OFFICE EDUCATION

Students

Deborah Alexander
Roxane Ardoin
Penny Bishop
Rebecca Bogan
Paula Boudreaux
Debra Colligan
Amy Crider
Tonna Dodon
Annette Dixon
Leslie Dodson
Keri Faulkner
Emily Hicks
Gwendolyn Keith
Terri Krumholt
Lisa Lee

Lisa Loudon
Suzanne Magione
Sherry McAllister
Angie McCearley
Patricia Netterville
Trudy O'Callaghan
Tracy O'Neal
Kimberly Robertson
Tina Rogers
Mary Alice Smith
Denise Smith
Valerie White
Teresa Wilson
April Worthy

Coordinator

Mildred Ann Henry

EMPLOYERS

American Bank & Trust Co.
Associated Enterprises
Baker Police
Baker Utilities
Big Jim's Mobile Homes
Butler & Bryant, CPA's
Keith Cox State Farm Insurance
Donaldson's Auto & Cycle Parts
East Baton Rouge Parish School Board
First State Bank & Trust Co.
G. P. Federal Credit Union
Larry Germany, D.D.S.
Group W Cable
La Capitol Federal Credit Union
Louisiana Department of Justice
Louisiana Division of Administration
Louisiana National Bank
Lowe's of Baker Inc.
Mayor of Baker
Motor Parts & Supply Co., Inc.
Otha Nelson, Attorney
Parker's Quality Meats Inc.
Reliable Credit Corp.
Sears, Roebuck & Co.
Tiger Rag Magazine
Zetz 7-Up Bottling Co.

Baker High School

COOPERATIVE OFFICE EDUCATION

EMPLOYER APPRECIATION DINNER

Continental Room
Bellemont Motor Hotel
May 11, 1982

PROGRAM

Trudy O'Callaghan, COE President, Presiding

INVOCATION............................ Emily Hicks
Vice President

INTRODUCTIONS..... Gwen Keith & Mary Alice Smith
Secretary — Treasurer

STUDENT ACHIEVEMENTS.............. Allen Spears
Assistant Principal Instruction

STUDENT CERTIFICATES......... Mildred Ann Henry
Coordinator

EMPLOYER CERTIFICATES
& AWARDS........................... Jerry Epperson
Principal

BOSS OF THE YEAR AWARD.......... Richie Bullock
Assistant Principal

BENEDICTION.......................... Tina Rogers
Reporter

APPENDICES H, I, AND J

CERTIFICATES OF APPRECIATION

APPENDIX H

Example of a Certificate of Appreciation for the Employer

Cooperative Office Education
of
Louisiana Public Schools

Certificate of Appreciation

awarded to

____

by ____________________________________ High School

In recognition of cooperation and participation in Office Training for

____________ years.

____
STATE SUPERINTENDENT OF EDUCATION

____
BUSINESS AND OFFICE EDUCATION

____
PRINCIPAL

____
COORDINATOR

Certificates may be obtained from the State Department.

APPENDIX I
Example of a Certificate of Appreciation for the Employer

Baker High School

East Baton Rouge Parish

This certificate is awarded to

____

in recognition of contribution to the office training of

____

for the year

____

(Seal of School)

____
Parish Superintendent

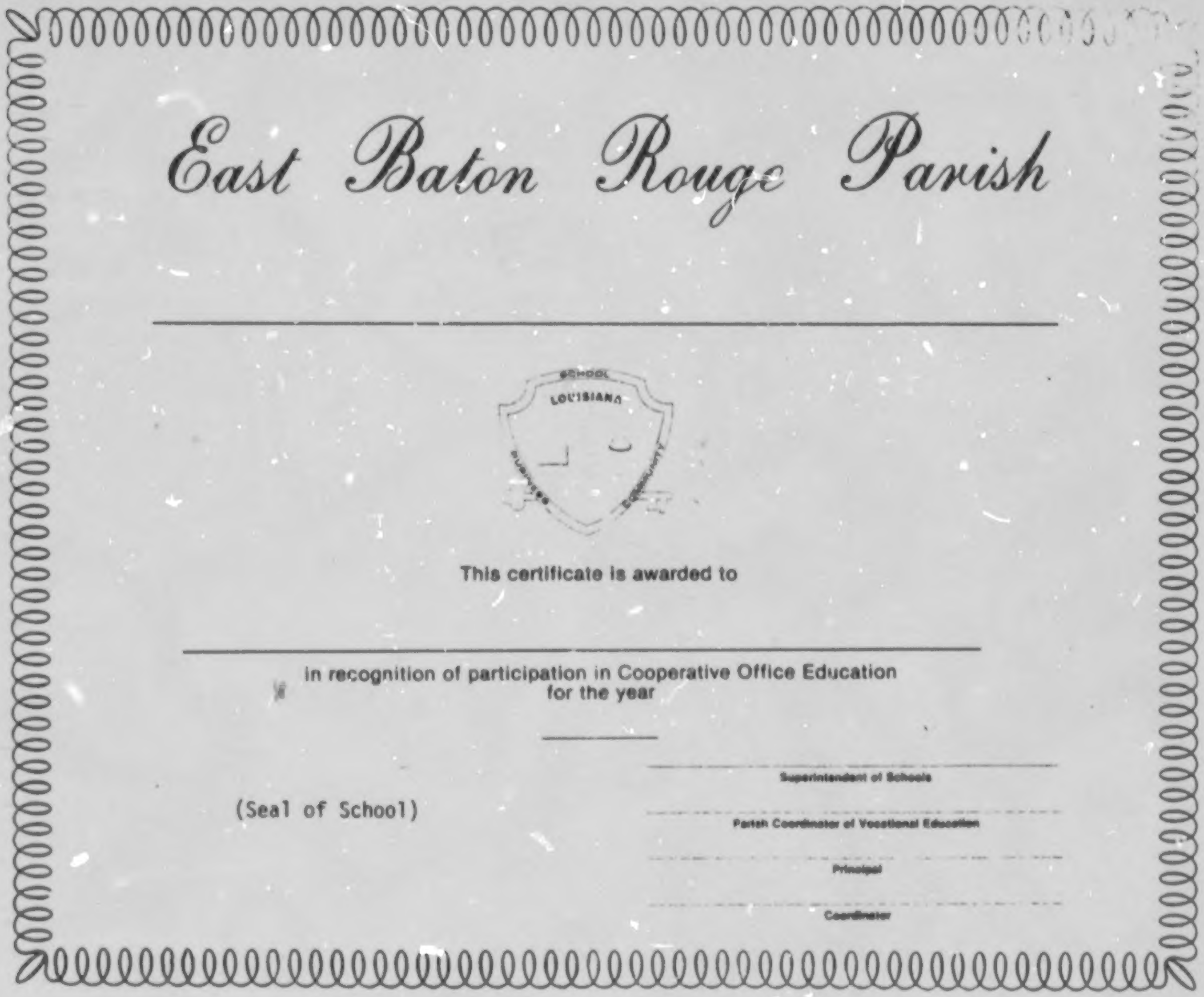
____
Parish Coordinator of Vocational Education

____
Principal

____
Coordinator

APPENDIX J

Example of a Certificate of Recognition for the Student



East Baton Rouge Parish

This certificate is awarded to

in recognition of participation in Cooperative Office Education
for the year

Superintendent of Schools

(Seal of School)

Parish Coordinator of Vocational Education

Principal

Coordinator

CLASSROOM NECESSITIES

Page

FACILITIES, EQUIPMENT, AND SUPPLIES F-1

Facilities F-1

Equipment F-1

Supplies F-3

APPENDIX

A. Model Room Layout F-4

FACILITIES, EQUIPMENT, AND SUPPLIES

Classroom accommodations for a COE program will vary and will require adjustments as needs and finances change.

Facilities

Instructional facilities may consist of one related classroom where other business subjects are taught, several fully equipped rooms, or laboratories which may or may not be shared with other business teachers. The classroom should appear as businesslike as possible while providing work stations that accommodate needed equipment, supplies, and work space. The following should be considered when furnishing the COE classroom:

1. Ample electrical outlets in safe, convenient locations are a necessity. A master switch should be included in the wiring plan.
2. Carpeting not only absorbs noise but also gives the room an office atmosphere and is easily maintained.
3. Lavatory facilities are necessary for easy cleaning after certain jobs.
4. Adequate storage for instructional aids as well as students' supplies requires provision.
5. Office furniture in an office arrangement should be used instead of the standard "schoolroom" furniture and arrangement. (Appendix A)

In addition to the instructional facilities, the coordinator should have a private area, preferably an office, where uninterrupted small meetings can take place. A telephone with an outside line is essential.

Equipment

Instructional equipment should be selected after careful evaluation with thought given to the following:

1. What equipment is currently used in business?

2. Can equipment be learned in a short time with little difficulty? (Choose equipment on which the student can expect to train for a reasonable amount of time.)

3. Will the equipment quickly become obsolete?

Items from the following list are appropriate for the COE classroom and/or office:

Typewriters--electric, electronic, memory
Office machines--electric, electronic calculators
Filing cabinets with and without locks
Duplicators--fluid, stencil, offset, electronic stencil maker
Projectors--overhead, film, filmstrip, slide
Stenographic laboratory
Transcribing/dictating machines
Tape recorder
Phonograph
Demonstration stand
Stencil filing cabinet
Mimeoscope
Collator/jogger
Copier--electrostatic or infrared
Typewriting L-shaped desks and chairs
Model secretarial desk (L-shapped) and chair
Typewriting demonstration stand
Assorted storage cabinets

Records must be kept for all equipment and should include location (room number), record of repairs, dates of purchase and disposal, make, serial number, cost, source of funds, and present condition. Section 104.37 of Title 45 (Federal) Rules and Regulations requires that inventories be maintained on items of equipment, each initially costing $100 or more, in which cost the Federal Government has participated--whether with funds derived from Federal grants or State or local matching funds. Inventory records must be maintained on both the local and state levels. The local educational agency should be prepared to credit the Federal Government with its proportionate share of the value of each item of equipment at the time it is sold or ceases to be used for vocational education purposes.

A long-range plan for equipment purchases is helpful when funds become available and must be spent in a limited time. Such a plan should include specifications, priority, prices, names and addresses of vendors, and other pertinent information.

Supplies

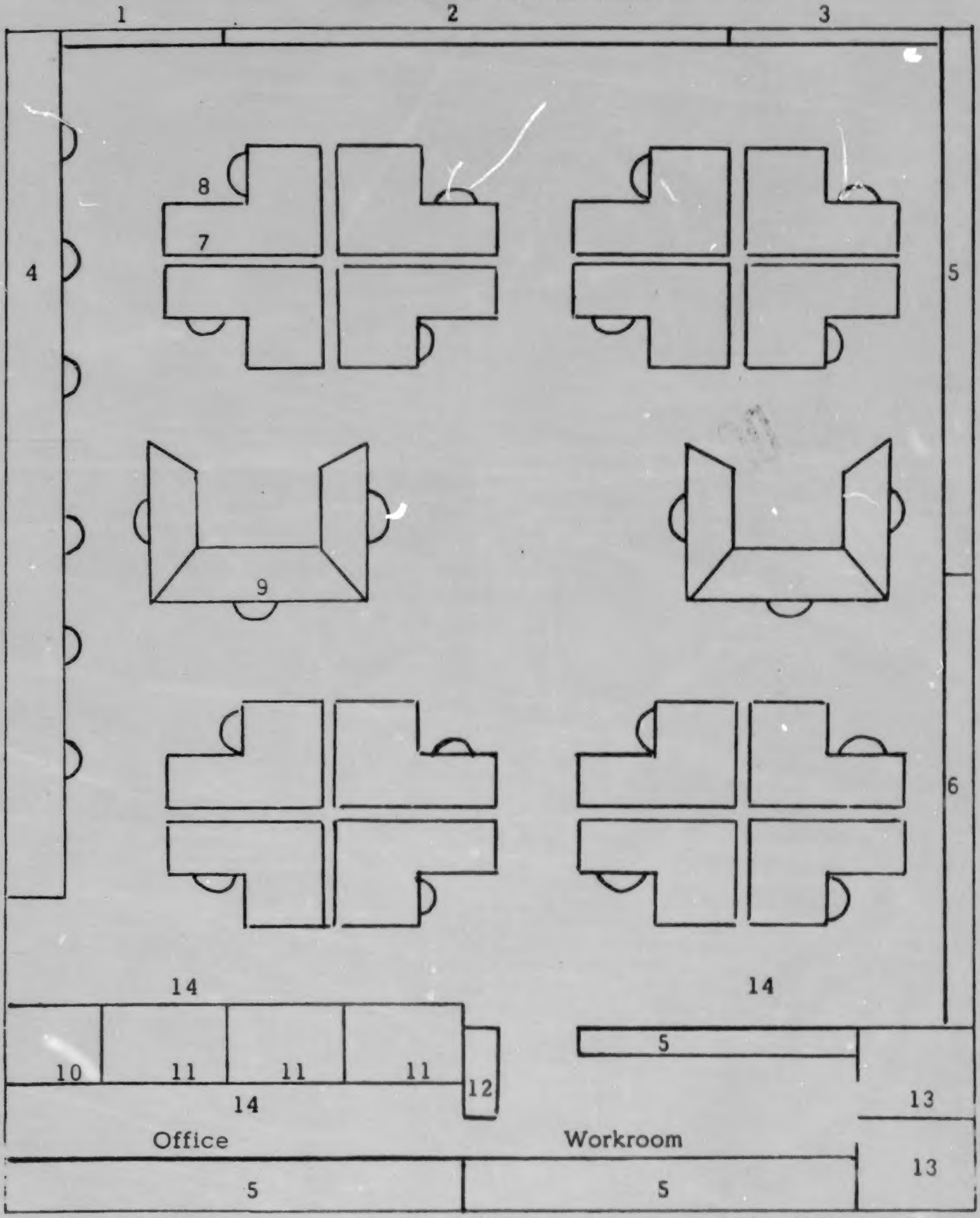
Amounts of available funds for supplies can vary from year to year. A "needs" list should be maintained at all times and consulted as funds become available. Supplies considered acceptable for COE include:

Stop watches
Interval timers
3-hole punch
Scissors
Staplers and removers
Copyholders
File baskets
Electric pencil sharpener
Paper cutter
Styli and lettering guides
Tape dispensers
Instructional tapes, belts, films, wall charts
Miscellaneous office supplies as needed

The COE coordinator should also collect additional instructional materials such as supplementary textbooks, occupational handbooks, occupational guidance materials, trade journals, and miscellaneous job related information.

APPENDIX A

MODEL ROOM LAYOUT


1
2
3
4
5
6
7
8
9
10
11
11
11
12
13
13
14
14
14
5
5
5
Office
Workroom

1. Tackboard
2. Chalkboard
3. Magazine Rack
4. Seating Counter
5. Standing Counter
6. Storage Cabinet
7. Secretarial Desk
8. Secretarial Chair
9. Trapezoidal Table
10. Coat Rack
11. Filing Cabinet
12. Sink
13. Mobiles
14. Glass

REPORTS

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State Department of Education Reports G-1

Parish Reports G-1

School Reports G-1

APPENDICES

A. Vocational Education Personnel G-2

B. Class Enrollment Report G-4

C. End of Year Report G-6

D. Mileage Report G-8

PROGRAM REPORTS

The COE teacher-coordinator will be required to submit various reports during the year. Organized management of records to assist the coordinator in completing these reports is essential. Reports will be directed to different agencies including the State Department of Education, parish school boards, and local school administrators.

State Department of Education Reports

September	VE-104A -	Vocational Education Personnel (must include "Program of Work" for extended programs) (Appendix A)
	BE-6602 -	COE Class Enrollment (must concur with succeeding reports relating to COE students) (Appendix B)
May	BE-6603 -	COE End of Year Report (Appendix C)

Others may be added as required by the United States Department of Education.

Parish Reports

A copy of all "state" reports should be sent to the parish vocational supervisor. Parishes may require other reports for in-parish use.

Coordinators will need to keep personal records of travel so they can submit accurate accounts of mileage for reimbursement. (Appendix D) Parishes set their own rates for travel reimbursements.

School Reports

Local school administrators may require additional reports. The coordinator can also use his/her own initiative in keeping the administration informed about the program.

FORM VE 104-A
(Revised September 1982)

APPENDIX A
OFFICE OF VOCATIONAL EDUCATION
LOUISIANA STATE DEPARTMENT OF EDUCATION
VOCATIONAL EDUCATION PERSONNEL

Submit in Quadruplicate
For Each Teacher

____
Date Submitted

________________ Fiscal Year

________________ Local Educational Agency

________________ Name of School

________________ Name of Instructor

________________ Degree Held

________ Agriculture
________ Business Education
________ Distributive Education
________ General Cooperative Education
________ Health Occupations
________ Home Economics - Consumer
________ Home Economics - Wage Earning
________ Industrial Arts
________ Trade and Industrial
________ Vocational Guidance

________________ Years of Experience

________________ Total 9-Month Salary (Exclude All Supplements)

________________ Years in Present Voc-Ed Program

I. TEACHING SCHEDULE OF VOCATIONAL INSTRUCTOR

Class Period	Subject Taught *See Note	Length of Period (Minutes)	ENROLLMENT Total	D	H	No. of Weeks Each Student is Enrolled in the Program
1st						
2nd						
3rd						
4th						
5th						
6th						
7th						

*NOTE: Show all Conference and Planning Periods. Indicate first and second semester courses when applicable. Under Enrollment, "D" is Disadvantaged and "H" is Handicapped.

II. EXTENDED EMPLOYMENT

Application is hereby made for federal and/or state reimbursement for salary of person named in this application. Before extended employment can be approved, the reverse side of this form must be completed.

____ Month(s)   Check appropriate month(s): ____July, ____August, ____June

III. TO BE FILLED IN BY LOUISIANA STATE DEPARTMENT OF EDUCATION

1. Certified: ________________ 2. Experience: ________________

Salary Matching Funds ____________ Pro Rata Time X $____________ 9-Month Salary = $____________

Extended employment approved for ______ months at $__________ = $____________

State retirement approved for ______ months at $__________ = $____________

RECOMMENDED BY: DATE:

____
Local Educational Agency

IV. EXTENDED EMPLOYMENT INFORMATION:

Subject Taught:______________________________ Estimated Enrollment:____________

Teacher Name: ______________________________ Teacher Aide Name:____________

Funding source for extended employment for this program:

__________: 120 Funds - Basic Grant
__________: Disadvantaged Set-Aside
__________: Handicapped Set-Aside
__________: 130 Funds - Vocational Guidance
__________: 140 Funds - Special Programs for Disadvantaged Students

__________: 150 Funds - Consumer Homemaking
__________: 120 Funds - Cooperative Education
__________: Agriculture State Funds
__________: On-Going State Funds
__________: Other:

Time Schedule: Daily Schedule______________________ Number of Weeks:__________

Days per week:____________________ Dates of Extended Employment: __________

Hours of Actual Instruction per Day: ____

V. PROGRAM DESCRIPTION: (Must include justification based on students needs, instructional objectives, and content outline. Attach additional sheet if necessary).

BE 6602

Date ____________ 19 ___

APPENDIX B

COOPERATIVE OFFICE EDUCATION
STATE DEPARTMENT OF EDUCATION
VOCATIONAL BUSINESS EDUCATION

CLASS ENROLLMENT REPORT

School ______________________ City ______________________ Parish ______________

Date Class Started ____________ 19___ Coordinator ______________________

Please fill in summary on reverse side.

Student	Job Objective*	Where Employed and Job Title	Date of Employment
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

*PLEASE use the CIP CODE number listed on the reverse side of this form when giving the job objective.

Enrollment: Male ______ Female ______

Total: ______________________

Signed: ______________________
Coordinator

Approved: ______________________
Principal

Approved: ______________________
Parish Supervisor

G-4

Student	Job Objective*	Where Employed and Job Title	Date of Employment
16.			
17.			
18.			
19.			
20.			
21.			
22.			
23.			
24.			
25.			
26.			
27.			
28.			
29.			
30.			

*PLEASE use the CIP code number listed below when giving the job objective.

CIP CODES AND TITLES TO DEFINE JOB OBJECTIVES

CIP Code	Title
07.01	Accounting, Bookkeeping, and Related Programs
07.02	Banking and Related Financial Programs
07.03	Business Data Processing and Related Programs
07.06	Secretarial and Related Programs
07.07	Typing, General Office and Related Programs

Summary

CIP CODE	BOYS	GIRLS	TOTAL
07.01			
07.02			
07.03			
07.06			
07.07			
GRAND TOTAL			

BE-6603 (Rev. 10/82)

APPENDIX C
STATE DEPARTMENT OF EDUCATION
VOCATIONAL BUSINESS EDUCATION
BATON ROUGE, LOUISIANA

Date ____________

COOPERATIVE OFFICE EDUCATION STUDENTS
END OF YEAR REPORT -

Please fill in this form in duplicate for each cooperative office education class and send the original to the State Office by

SCHOOL ____________ CITY ____________ PARISH ____________

Name of Student	SEX M	 F	Where Employed & Job Title During School Year	Job Classification (Use CIP codes listed on next sheet)	Wages Per Hour	Total Yearly Earnings
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						

Number of Employers Participating ______

SIGNED ____________________
Coordinator

Number of Students ______ M ______ F ______

Name of Student	SEX		Where Employed & Job Title During School Year	Job Classification (Use CIP codes listed on this sheet)	Wages Per Hour	Total Yearly Earnings
	M	F				
11.						
12.						
13.						
14.						
15.						
16.						
17.						
18.						
19.						
20.						
21.						
22.						
23.						
24.						
25.						

G-7

CIP CODES TO BE USED IN JOB CLASSIFICATION COLUMN

07.01	Accounting, Bookkeeping, and Related Programs
07.02	Banking and Related Financial Programs
07.03	Business Data Processing and Related Programs
07.06	Secretarial and Related Programs
07.07	Typing, General Office, and Related Programs

APPENDIX D

MILEAGE REPORT

	FIRMS CONTACTED	PERSONS IN CHARGE	BEGINNING MILEAGE	ENDING MILEAGE

This is for your own personal record

STUDENT ORGANIZATIONS

Page

FUTURE BUSINESS LEADERS OF AMERICA H-1

COE CLUB H-2

FUTURE BUSINESS LEADERS OF AMERICA

Future Business Leaders of America is a secondary organization for students who are interested in business and office occupations. The program of instruction develops leadership competencies through business education courses.

Cooperative Office Education students are encouraged to join and participate in FBLA activities. COE students can be valuable members to FBLA because of their unique on-the-job training opportunities. Two FBLA competitive events are especially designed for and limited to COE students. Both events can be successfully integrated with regular COE classroom instruction. The first event, Job Description Manual, is designed to test the student's ability to prepare a comprehensive job description manual. The manual must relate to a specific job or work station held by the contestant. Manuals are submitted to the state office for judging prior to the state conference. The first place manual is submitted to National as Louisiana's entry.

The second competitive event is Job Interview and is designed to acquaint students with employment procedures they will face when applying for positions. Louisiana guidelines restrict contestants to those students enrolled in a cooperative education program. Contestants prepare resumes and letters of application prior to attending simulated job interviews. Contestants compete at the district and state levels with the state winner becoming eligible to compete in national competition.

Information about this organization can be obtained from the following:

State	National
Mrs. Connie G. Buck Executive Secretary, FBLA P. O. Box 44064 Baton Rouge, LA 70804	Future Business Leaders of America/ Phi Beta Lambda - FBLA/PBL Executive Director Dulles International Airport Post Office Box 17417 Washington, DC 20041

COE CLUB

Leadership within the local COE program can be fostered through the election of officers. These officers can assist the coordinator in recordkeeping, fund raising, and public relations activities.

Club activities can be as limited or extensive as the coordinator and student members decide.

SUPPLEMENTARY

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MINIMUM STANDARDS	I-5
STATE DEPARTMENT OF EDUCATION PERSONNEL	I-10
STATE DIRECTORY OF COORDINATORS	I-11

GLOSSARY

Advisory Committee - A group of persons, usually outside the educational profession, selected for the purpose of offering advice and counsel to the school regarding the vocational education program. Members are representatives of the people who are interested in the activities with which the vocational program is concerned.

Agriculture Education - The study of farming, other scientific agricultural occupations, or any occupation involving knowledge and skills in agricultural subjects.

Agriculture Occupations - Those occupations involving knowledge and skills in agricultural subjects which include the functions of producing, processing, and distributing agricultural products, and services related thereto.

Business Education - A summary of groups of instructional programs that prepare individuals for a variety of activities in planning, organizing, directing, and controlling all business office systems and procedures. Includes instruction in preparing, transcribing, systematizing, and preserving written communications and records; preparing and analyzing money; gathering, processing and distributing information and mail; operating office machines and electronic data processing equipment; storing, distributing, and accounting for inventories of materials; operating telephone switchboards and delivering messages; and performing other business office duties.

Occupational programs included are:

1. Accounting, Bookkeeping, and Related Programs - A group of instructional programs that prepare individuals to systematize information about transactions and activities into accounts and quantitative records, verify accuracy of data by applying auditing principles, prepare budgets and financial reports, operate bookkeeping machines, and pay and receive money.
2. Banking and Related Financial Programs - A group of instructional programs that prepare individuals to perform financial or banking services. Includes instruction in credit collection, transit routing of notes and drafts, receiving and paying out money, and functions associated with processing loans and insurance claims.
3. Business Data Processing and Related Programs - A group of instructional programs that prepare individuals to analyze and design data processing system configurations; write, test monitor, debug, and maintain data processing programs; and operate computers and peripheral and data-entry equipment.

4. Secretarial and Related Programs - A group of instructional programs that prepare individuals to record and transcribe communications and to provide administrative support.

5. Typing, General Office, and Related Programs - A group of instructional programs that prepare individuals to record, duplicate, and retrieve data--including classifying, sorting, and filing correspondence, records, and other data. Includes instructions in shipping and receiving procedures, stock and inventory maintenance, and operation of office machines.

Career Objective - A student's statement of an occupational goal.

Community Survey - A survey administered to businesses and industries in the local community to determine the need for training as well as potential work stations.

Competency - A specific knowledge or skill essential to the performance of a job responsibility, normally stated with a level or standard.

Cooperative Plan - An organizational pattern for preparatory instruction which involves regularly scheduled part-time employment that gives students an opportunity to experience theory in practice while developing and refining their occupational competencies through supervised learning experiences at training stations.

Cooperative Vocational Education - A cooperative program of vocational education for persons who, through a cooperative arrangement between the school and employers, receive instruction in required academic courses and related vocational instruction by the alternation of study in school with a job in any occupational field. These two experiences must be planned and supervised by the school and employers so that each contributes to the student's education and to his employability. Work periods and school attendance may be on alternate half days, full days, weeks, or other periods of time in fulfilling the cooperative vocational education program.

Coordination - The process of integrating into a harmonious relationship the administrative, organizational, and instructional activities of the vocational program and directing them toward a common purpose.

Disadvantaged Persons - Individuals who have academic, socio-economic, cultural, or other handicaps that prevent them from succeeding in regular occupational education. Includes persons whose needs for specially designed programs result from poverty, neglect, delinquency, or cultural or linguistic isolation from the community at large. The term does not include physically or mentally handicapped persons unless such persons also suffer from these disadvantages.

Employability Skills - Skills and knowledge that enable one to obtain and hold a job.

Evaluation - A continuous process which includes four types of evaluation for the cooperative program: student, training station, program, and follow-up.

Gainful Employment - Employment in a recognized, new, or emerging occupation for which persons normally receive a wage, salary, or fee.

General Cooperative Education - A cooperative program of vocational education in which students are given supervised work experience in any one of a variety of occupations, combined with related classroom instruction. This type of program is suited especially to communities where the need for workers is too limited to justify separate courses for each occupation.

Handicapped Persons - Mentally retarded, hard of hearing, deaf, speech impaired, visually handicapped, seriously emotionally disturbed, crippled, or other health impaired persons who, by reason of their handicapping condition, cannot succeed in a vocational program and require special educational assistance or a modified vocational program.

Hazardous Occupations - Any and all of those occupations which the United States Department of Labor has ruled are too dangerous for workers under 18 years of age. This ruling makes such employment illegal and subjects employers to severe penalties in the event of violations--only affects businesses engaged in interstate commerce.

Health Education - An instructional program which prepares persons for occupations that render health services directly to patients to provide planned instructional experience in appropriate clinical situations.

Health Occupations - Those occupations which provide diagnostic, therapeutic, preventive, restorative, and rehabilitative services to people.

Home Economics Education - Education for homemaking which prepares for proficiency in carrying out responsibilities of home and family life and provides the basic knowledge and skills for occupational fields.

Individualized Instruction - Instruction planned to fit the needs and abilities of the individual in relation to his/her career objective--may vary in content and timing for the instruction of each individual.

Industrial Education - A program of instruction designed to develop manipulative skills, safety judgments, trade ethics, leadership abilities, technical knowledge, and related occupational information.

Job Supervisor - The person on the job is directly responsible for supervising and training the student-trainee. (Also called Training Sponsor)

Local Plan - A statement by a local school system about its program, facilities and equipment, personnel, advisory committee, and other elements in the vocational education area.

Marketing and Distributive Education - A program of instruction in the field of distribution and marketing designed to prepare individuals to enter, to progress, or to improve competencies in distributive occupations. Emphasis is on the development of attitudes, skills, and understanding related to marketing, merchandising, and management.

Marketing and Distributive Occupations - Occupations including proprietors, managers, or employees engaged primarily in marketing or merchandising goods or services. These occupations are commonly found in various business establishments such as retailing, wholesaling, manufacturing, storing, transporting, financing, and risk bearing.

Occupational Survey - A written survey of area businesses to determine the need for training, labor supply and turnover, and job standards.

On-The-Job Training - The work experience phase of the cooperative program referring to the process of learning skills in a job setting rather than a classroom.

Program Evaluation - An evaluation done by the teacher-coordinator and administration of the local school as well as the State Department of Education to determine the effectiveness of the cooperative program and other vocational programs.

Related Cooperative Instruction - Instruction designed to develop occupational skills, technical and occupational knowledges, and employability skills conducted in the classroom laboratory or similar teaching/learning environment.

State Plan - A written proposal by the State Department of Education and submitted to the U. S. Commissioner of Education in accordance with the 1963 Vocational Education Act and its subsequent amendments. The proposal includes rules, regulations, financial information for the state's vocational education, immediate and future plans, and a description of educational professional development.

Student-Trainee - A student enrolled in the cooperative vocational program receiving on-the-job training.

Training Agreement - Form prepared by the teacher-coordinator indicating the period of training, hours of work, salary, and other pertinent facts and information necessary to assure basic understanding of the student's position as a student-learner in the cooperative education program.

Training Memorandum (Plan) - Written plan of experiences indicating what is to be learned by a specific student and whether it is to be taught in the classroom (group or individual instruction) or at the training station, or both. The plan is derived from a realistic analysis of the tasks, duties, responsibilities and occupational objectives of the student-learner. A copy for each student-trainee must be on file at his/her training station to meet the requirements of the Louisiana Department of Labor.

Training Sponsor - Individual at the training station who is directly responsible for the student-learner's activities on the job. Training sponsor can be the owner or manager of the business or an employee appointed by management.

Training Station - Business where the student receives supervised learning experiences related to his/her occupational objective through part-time employment while enrolled in a cooperative vocational program.

*Work Experience - Employment undertaken by a student while attending school.

Work Experience Education - Employment undertaken as part of the requirements of a school and designed to provide planned experiences in a chosen occupation. Supervision is provided by a teacher-coordinator and the employer.

Work Permit - An employment certificate issued to minors under 18 years of age after employer has completed an "Intention to Employ" form. Work permits are no longer required for cooperative program students. A copy of the Cooperative Part-time Training Memorandum (Plan) must be kept on file by the employer to meet requirements of the Louisiana Department of Labor.

*Also known as on-the-job training.

MINIMUM STANDARDS

To be included when approved by State Board of Elementary and Secondary Education.

STATE DEPARTMENT OF EDUCATION PERSONNEL

J. Kelly Nix
State Superintendent of Public Education

N. J. Stafford, Jr., Ed.D.
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Connie G. Buck, Supervisor and FBLA Executive Secretary

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ADDRESS:

Louisiana Department of Education
P. O. Box 44064
Baton Rouge, LA 70804

STATE DIRECTORY OF COORDINATORS

To be included when information is available.

THE EVALUATION PROCESS

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Classroom Evaluation J-1

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B. Student Attendance and Work Report Form J-4

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G. Evaluation of COE Program by Employer J-13

H. Evaluation of COE Program by Student J-14

EVALUATION OF THE STUDENT

The progress of the Cooperative Office Education student must be evaluated both in the classroom and on the job. The method used for determining the final grade for a specific reporting period must be tailored to the individual school program.

Classroom Evaluation

The evaluation of the classroom work for a given grade reporting period will be determined by the teacher-coordinator.

Training Station Evaluation

Just as a student's classroom progress cannot be based on a single criterion, the student's progress on the job must be measured through continuous evaluation and periodic written evaluations. Continuous evaluation of the student's progress on the job is accomplished through observations made by the teacher-coordinator during coordination visits and through responses by the student on some type of work report form (see Appendices A and B). In addition, periodic written evaluations must be made in conjunction with the grade reporting period. The periodic evaluation form (see Appendices C, C-1, and D) should be completed by the training station supervisor and submitted to the teacher-coordinator prior to the end of the grading period. It is recommended that the teacher-coordinator review the periodic evaluation form with the training station supervisor prior to the completion of the initial evaluation. If feasible, the teacher-coordinator and the training station supervisor should review the completed evaluations prior to the assigning of the final grade for the grading period. The teacher-coordinator in turn has a responsibility to use the information from the evaluation when counseling with the student.

EVALUATION OF THE TRAINING STATION

In reviewing the effectiveness of the on-the-job experience for the COE student, the teacher-coordinator may want to include some type of evaluation of the training station. Appendix E is an illustration of an evaluation which might be completed by the student. Appendices F and F-1 illustrate an evaluation to be completed by the teacher-coordinator. If such evaluations are used, the form should be adapted to the needs of the individual COE program. Care should always be taken to maintain the professionalism of the evaluation; the evaluation form should be aimed toward evaluating the effectiveness of the training station, not the personality of the supervisor.

EVALUATION OF THE COE PROGRAM

In addition to a self-evaluation of the COE program, the teacher-coordinator should solicit input from the training stations and the students in evaluating the effectiveness of the COE program. The evaluation instrument used should be designed to provide useful information for improving the program. Care should be exercised to be sure the evaluation does not become an ego-trip for the teacher-coordinator nor an exercise in vindictiveness by the student. Appendix G is an illustration of an evaluation which might be completed by the training station supervisor; Appendix H, by students.

APPENDIX A

Example of Student Work Report Form

STUDENT WORK REPORT

Name ______________________________ Date ______________

Training Station ______________________________________

Name of Immediate Supervisor ___________________________

Days Worked Per Week ____________ Hours Worked Per Day __________

Wages Paid Per Hour ____________

Duties Performed ______________________________________

____

____

____

____

Machines Used ____

____

____

Task I Enjoy Most _____________________________________

____

____

Task I Enjoy Least ____________________________________

____

____

I Need Help With ______________________________________

____

____

____

APPENDIX B

Example of Student Attendance and Work Report Form

ATTENDANCE AND WORK REPORT

Name________________________________ Dates:____________ ____________
From To

Training Station________________________ Supervisor______________________

	M	T	W	T	F	S/S	M	T	W	T	F	S/S
Scheduled Working Time FROM:												
TO:												
List routine tasks:												
List new tasks:												
Total Hours Worked Daily												

Total Hours Worked This Period_______ Rate of Pay Per Hour_________

Gross Amount Earned for Period__________

Describe some event that occurred this period that made you feel good._________

____

____

Describe some event with which you had a problem.____________________

____

____

SUPERVISOR'S SIGNATURE

1st Nine Weeks ____________________

2nd Nine Weeks ____________________

3rd Nine Weeks ____________________

4th Nine Weeks ____________________

COMMENTS

1st Nine Weeks ____________________

2nd Nine Weeks ____________________

3rd Nine Weeks ____________________

4th Nine Weeks ____________________

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APPENDIX C

Example of Report Card to be Completed by Training Station Supervisor

EAST BATON ROUGE PARISH
COOPERATIVE OFFICE EDUCATION
ON-THE-JOB EVALUATION

STUDENT'S NAME ____________________

TRAINING STATION ____________________

____
Teacher-Coordinator

____
School

____
Address

Student ______________________________

High School ______________________________

Teacher-Coordinator ______________________________

Training Station ______________________________

Address ______________________________

Supervisor ______________________________

Rating Key:
4 - Very High
3 - High
2 - Average
1 - Low
0 - Very Low

GRADING PERIODS: (Check Appropriate Column)

Qualities To Be Rated	1st 9 weeks					2nd 9 weeks					3rd 9 weeks					4th 9 weeks				
	4	3	2	1	0	4	3	2	1	0	4	3	2	1	0	4	3	2	1	0
DEPENDABILITY: Prompt, sincere, able to work without supervision, follows instructions.																				
ABILITY TO GET ALONG WITH OTHERS: Adaptable, friendly tactful, cooperative, willing to be counseled, respect for others.																				
PERSONAL APPEARANCE AND GROOMING: Appropriate clothes for office, clean, neat appearance, poise and orderly.																				
INITIATIVE: Goes ahead without constant reminders.																				
ATTITUDE: Toward criticism, customers, clients and other employees.																				
QUALITY OF WORK: Accuracy and completeness of work. (As compared with employees of equal age.)																				
ATTENDANCE AND PUNCTUALITY																				
QUANTITY OF WORK																				
KNOWLEDGE OF JOB																				

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APPENDIX C-1
Example of Report Card to be Completed by Training Station Supervisor

COMMENTS

1st 9 weeks ....

2nd 9 weeks ....

3rd 9 weeks ....

J-7

4th 9 weeks ....

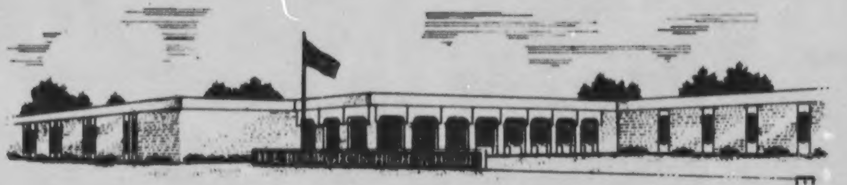
SUPERVISOR'S SIGNATURE

1st 9 weeks ....

2nd 9 weeks ....

3rd 9 weeks ....

4th 9 weeks ....



COOPERATIVE OFFICE EDUCATION PROGRAM
ON-THE-JOB TRAINING
EVALUATION

Student's Name..

Training Station..

H. L. Bourgeois High School
route 1, Box 242
Gray, Louisiana
872-3277

Luther Fletcher
Principal

Donald Johnson
Assistant Principal

Frank Kidd
Assistant Principal

STUDENT ....

JOB CLASSIFICATION ....

TEACHER-COORDINATOR...

RATING KEY:
4 - Excellent
3 - Above Average
2 - Average
1 - Below Average
0 - Failing

TRAINING STATION ....

ADDRESS...

SUPERVISOR ....

PLACE A CHECK MARK IN THE APPROPRIATE COLUMN FOR EACH OF THE GRADING PERIODS BELOW.

	1st 9 weeks						2nd 9 weeks						3rd 9 weeks						4th 9 weeks					
	4	3	2	1	0		4	3	2	1	0		4	3	2	1	0		4	3	2	1	0	
QUALITY & QUANTITY OF WORK: Has aptitude for doing neat, accurate work, giving attention to details; budgets time carefully; gets the job done in a minimum amount of time; has an acceptable production output.																								
PUNCTUALITY: Being to work on time; returning from lunch or breaks on time; arranging for lateness and/or time off in advance; informing the employer immediately of any circumstances preventing the trainee from reporting to work on time.																								
ATTITUDES TOWARD WORK: Takes a keen interest in training; shows initiative; looks for ways to improve; is inquisitive and enthusiastic about each of the assigned job duties.																								
HUMAN RELATIONS: Cooperates eagerly with supervisors and accepts suggestions; tactful and understanding in dealing with people; promotes goodwill; controls emotions; makes a favorable impression on all concerned.																								
PERSONAL APPEARANCE: Presents an appropriate well-groomed businesslike appearance; follows company dress policy; has presentable hairdo; uses proper make-up for office work.																								
WORK AREA: Keeps work station neat and organized; takes pride in the appearance of work area; is extremely careful in the use of company equipment; uses good judgment when handling all company supplies.																								
IMPROVEMENT IN SKILL: Has developed the ability to think for himself/herself without excessive supervision; recognizes the value of the training opportunity offered; has gained satisfactory speed and accuracy on the job; has become proficient in the use of machines in the office; has achieved businesslike habits.																								

J-8

OVERALL GRADE PER PERIOD: (School Use Only)

1st 9 weeks: ....

2nd 9 weeks: ....

3rd 9 weeks:...........

4th 9 weeks:...........

DAYS ABSENT PER PERIOD: (Employer Use Only)

1st 9 weeks: ....

2nd 9 weeks: ....

3rd 9 weeks ....

4th 9 weeks............

APPENDIX D

Example of Student Evaluation Form

STUDENT EVALUATION FORM

STUDENT ________________________ SCHOOL ________________________

FIRM ________________________ COORDINATOR ________________________

Careful analysis of the character, personality, and work habits of all students is extremely valuable to the employer, the coordinator, and the student. This rating chart sets up eight simple but important classifications that will give a clearer picture of the student's merit and future potential.

Please check one in each category:

1. QUANTITY

_____ a. Production high
_____ b. Production average
_____ c. Production sometimes below average
_____ d. Production consistently below average

2. QUALITY

_____ a. Is extremely careful and thorough
_____ b. Quality is better than average
_____ c. Is satisfactorily correct and thorough
_____ d. Gives adequate attention

3. ATTITUDE TOWARD WORK

_____ a. Is exceptionally cooperative and willing
_____ b. Is enthusiastic and interested
_____ c. Shows little interest
_____ d. Is indifferent and/or critical

4. KNOWLEDGE OF JOB

_____ a. Sufficient understanding of his own and related work
_____ b. Understands obvious and routine aspects of job
_____ c. Improving and increasing understanding of job
_____ d. Slow to understand variation from routine assignments

5. GROOMING

_____ a. Always businesslike in personal appearance
_____ b. Usually clean, neat, and appropriately dressed
_____ c. Unbusinesslike in personal appearance
_____ d. Occasionally offensive

6. DEPENDABILITY AND INITIATIVE

_____ a. Looks for and takes on additional tasks
_____ b. Requires only normal supervision
_____ c. Requires close supervision
_____ d. Cannot be left to work alone

7. RELATIONS WITH OTHERS

_____ a. Always works well with others
_____ b. Works well with most fellow workers
_____ c. Works well with some co-workers
_____ d. Has friction with fellow workers

8. EMOTIONAL STABILITY

_____ a. Always self-controlled, receptive to criticism
_____ b. Seldom upset by pressures or reverses
_____ c. Easily offended; resents criticism
_____ d. Worries to excess over real or imagined problems

9. What are the outstanding good points, if any, of this employee? ________________________

____

____

10. What are the important weak points, if any, of this employee? ________________________

____

____

________________________ ________________________
Date Supervisor

71/10/270

APPENDIX E

Example of Form for Evaluation of Training Station by Student

STUDENT EVALUATION OF TRAINING STATION

Date____________________________

Student's Name____

Training Station____

Supervisor's Name____

Present duties____

____

Beginning Date________________ Termination Date________________

Yes No 1. Did you receive appropriate orientation when you started the job?

Yes No 2. Were the rules and regulations of the training station explained?

Yes No 3. Are you under daily supervision?

Yes No 4. Are you given adequate assistance when you need it?

Yes No 5. Are your fellow employees friendly and courteous?

Yes No 6. Do you feel advancement is available to you if you are working full time?

Rate your supervisor on the following points:

Good Average Poor 1. Introduced you to other employees in department.

Good Average Poor 2. Explained changes which affected you.

Good Average Poor 3. Showed an interest in you and your job.

Good Average Poor 4. Counseled with you as needed regarding problems.

What did you like best about your job?______________________________

____

Suggestions for improving working conditions:_________________________

____

APPENDIX F

Example of Form for Evaluating Training Station by Teacher-Coordinator

TEACHER EVALUATION OF
TRAINING STATION

E = excellent
S = satisfactory
U = unsatisfactory

E S U 1. Location of training station in relation to campus.

E S U 2. Beginning wage.

E S U 3. Observation of child labor laws.

E S U 4. Participation in preparation of student's training plan.

E S U 5. Employee morale.

E S U 6. Equipment and facilities.

E S U 7. Appropriateness of instruction.

E S U 8. Variety of learning experiences.

E S U 9. Cooperation with coordinator.

E S U 10. Timely preparation of written student evaluation.

E S U 11. Opportunity for advancement.

E S U 12. Opportunity for full-time employment.

APPENDIX F-1

Example of Checklist for Evaluating Student Training Station by Teacher-Coordinator

CHECKLIST FOR EVALUATING STUDENT TRAINING STATIONS

Do you find that the station

_____ is located so that transportation to and from home and school is not too time-consuming or costly.

_____ has satisfactory employee morale.

_____ has equipment and facilities which are adequate, reasonably modern and in good condition.

_____ provides a physical and moral environment which is safe and beneficial for the student.

_____ observes Federal and State laws and employment regulations.

Do you find that the training station is willing to

_____ provide instruction, not merely obtain part-time employees.

_____ provide a wide variety of learning experiences compatible with individual needs and capabilities.

_____ develop jointly with the coordinator a training plan.

_____ work closely with the student and the coordinator to improve instruction.

_____ make instructional materials available to the student and the coordinator.

_____ designate supervisory personnel who will direct the student training competently and with enthusiasm.

_____ confer periodically with the COE coordinator and evaluate the student in writing.

_____ provide employment which meets or relates to career interest of the student.

_____ employ the student for at least 15 hours per week for the entire school year and establish a reasonable working schedule for the student.

_____ discuss opportunities for advancement and full-time employment.

_____ provide a beginning wage comparable to other part-time workers doing the same work.

APPENDIX G

Example of Form for Evaluation of the COE Program by the Employer

EMPLOYER EVALUATION OF THE COOPERATIVE OFFICE EDUCATION PROGRAM

Date________________________________

Training Station____

Yes No 1. Do you feel the classroom instruction was coordinated with the student's work experience?

Yes No 2. Was the coordinator's supervision of the working student adequate and helpful?

Yes No 3. Do you feel the student's skills and abilities were appropriately considered in placing him/her at this training station?

Yes No 4. Did the coordinator analyze the job duties to determine appropriate classroom instruction?

Yes No 5. Did the student have or develop appropriate work habits for the training station position?

Yes No 6. Was there a noticeable difference between the COE student and any other high school student who might be hired?

Yes No 7. Did the coordinator visit the training station often enough?

If "no," please explain____________________________________

____

Yes No 8. Did the coordinator visit the training station at appropriate times?

If "no," please explain____________________________________

____

Yes No 9. Do you think the Cooperative Office Education program should be continued?

Please make any comments or suggestions for the improvement of the COE program.

____

____

____

____

APPENDIX H

Example of Form for Evaluation of the COE Program by Student

STUDENT EVALUATION OF THE COOPERATIVE OFFICE EDUCATION PROGRAM

Date ______________________________

Yes No 1. Do you feel that you have benefited from the classroom instruction you received in COE?

Yes No 2. Do you feel that you have benefited from the work experience you received through your participation in COE?

Yes No 3. Did your classroom instruction relate directly to your training station duties?

Yes No 4. Would you recommend the inclusion of any additional units in the classroom instruction phase of COE?

If "yes," please explain ______________________________

____

____

Yes No 5. Would you recommend the exclusion of any units from the classroom instruction phase?

If "yes," please explain ______________________________

____

Yes No 6. Do you have any suggestions to improve the order of the units presented in the classroom instruction phase?

If "yes," please explain ______________________________

____

Yes No 7. Could the work experience phase be improved?

If "yes," please explain ______________________________

____

____

Yes No 8. Do you feel that your classroom and work experiences will help you as you seek full-time employment?

Yes No 9. Do you feel that you have more self-confidence as a result of your experiences in COE?

UNITS OF INSTRUCTION

UNITS OF INSTRUCTION

The following units are suggested topics that might be included in the COE classroom instruction. The order in which the topics will be covered will vary depending upon the needs of the students and the business community.

RECOMMENDED FOR ALL STUDENTS

- Orientation to COE
- Telephone Techniques
- Word Processing Concepts and Hands-on Experience
- Human Relations Skills
- Securing and Keeping a Job

RECOMMENDED FOR INDIVIDUALIZED INSTRUCTION

- Communication Skills
- Financial Records
- Business Math/Machines
- Typing Review
- Shorthand Review
- Office Procedures Review
- Specialized Office Problems
    - Insurance Office
    - Legal Office
    - Medical Office
    - Banking

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UNIT I

COOPERATIVE OFFICE EDUCATION ORIENTATION

INTRODUCTION

Cooperative Office Education is a vocational business education program for high school seniors who plan a career in secretarial work. This program is designed to affect the transition from student to employee through a combination of classroom instruction and actual experience in the laboratory of the business world.

The students attend school in the morning and receive on-the-job training in an office during the afternoon. Each student-trainee receives three units of credit for the successful classroom and job performance and is under the supervision of the coordinator from the school as well as the job supervisor from the training station.

COMPETENCIES

1. Exhibit an understanding of the Cooperative Office Education program and an awareness of the responsibilities of each of the three parties involved in the COE program--coordinator, student, and employer.
2. Exhibit a positive attitude for successful job performance.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Exhibit an understanding of the facets of the COE program.
2. Demonstrate an understanding of classroom and training station procedures.
3. Exhibit desirable personal growth.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. On a written test, students will be able to list at least three advantages of a COE program.
2. After reviewing the various items that are included in a COE student's personal file, students will be able to complete the file in class and maintain it throughout the school year with 100 percent accuracy.

3. After discussing the training station sponsor's role in class, students will be able to identify four major duties of the COE training station sponsor.

SUGGESTED INTEREST APPROACHES

1. Invite a former COE student to speak on the advantages of being a COE student.
2. Have an experienced secretary discuss advantages, disadvantages, promotions, salaries, etc., of secretaries and office workers already working in the business world.
3. Invite a personnel director to speak on the "Dos and Don'ts of an Interview."
4. Use various audio-visual materials to support orientation activities.

METHODOLOGY

This unit has been designed to be a flexible method of orienting new COE students to Cooperative Office Education through the use of teacher lectures, discussions, case-study groups, outside lecturers, filmstrips, and guest speakers. THIS UNIT IS DESIGNED TO BE USED IN A SUMMER ORIENTATION SITUATION.

UNIT OUTLINE

COOPERATIVE OFFICE EDUCATION

I. Objectives of COE Program
    A. Definition
    B. Coordinator's responsibilities
    C. Student's responsibilities
    D. Employer's responsibilities
    E. Evaluation
        1. Classroom
        2. On-the-Job

II. Personal Growth (See Human Relations Unit)

III. Pre-employment (See Securing and Keeping a Job Unit)

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

---

1. On a written test, students will be able to list at least three advantages of a COE program.

Subject Matter Content	Learning Activities
Objectives of program	1. Prepare bulletin board illustrating components of COE program. 2. Discuss in groups the responsibilities of the coordinator, students, and employers. Groups will present a summary to the class. 3. Prepare a self-evaluation. Write a plan for self-improvement, file it in personal folder to be reviewed at the end of the school year.

---

2. After reviewing the various items that are included in a COE student's personal file, students will be able to complete the file in class and maintain it throughout the school year with 100 percent accuracy.

Subject Matter Content	Learning Activities
Forms	1. Discuss in groups the different types of forms. 2. Complete forms for personal folder. 3. View film on importance of personnel records.

---

3. After discussing the training station sponsor's role in class, students will be able to identify four major duties of the COE training station sponsor.

Subject Matter Content	Learning Activities
Employer's responsibilities	1. Discuss in small groups the supervisor's responsibility to a student. Present summary to class. 2. Discuss in small groups methods of student evaluation that employers will use. Present information to class. 3. Role-play common employee on-the-job infractions (Ex. excessive tardiness) and the employer's handling of such infractions.

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

- Unit test
- Class evaluation
- Class participation grade

EQUIPMENT AND SUPPLIES

Students	Teacher
Typewriter	Textbooks and Manuals
Pen	Projector
Pencil	Screen
Notebook	Films
Bulletin Board Supplies	Typewriter
Calculator	Bulletin Board Supplies

SUPPLEMENTARY MATERIALS

Filmstrips with Cassettes

First Jobs
(9 filmstrips, 9 cassettes)
Educational Design, Inc.
47 W. 13th Street
New York, NY 10011

Goofy Goes to Work
(6 filmstrips, 6 cassettes)
Walt Disney Educational Media Company
2100 Riverside Drive
Burbank, CA 91505

Just a Secretary
(1 filmstrip, 1 cassette)
Educational Activities, Inc.
Freeport, NY 11520

The Look Is Natural
(1 filmstrip, 1 cassette)
Educational Activities, Inc.
Freeport, NY 11520

The Secretary in a Changing Role
(4 filmstrips, 4 cassettes)
Educational Enrichment Materials
(A Division of The New York Times)
157 Chambers Street
New York, NY 10007

Textbooks

Century 21 Typewriting
2nd edition
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Transparencies

Personal Development Transparencies
(10 sets, each set containing 8 transparencies)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Miscellaneous

Outside lecturers are supplied from the local business community--in particular, current training station sponsors.

Question and Answer series on "Applying for a Job"
Jerry Starr
South Terrebonne Media Center
General Delivery
Bourg, LA 70343

RESOURCES

"Acting Responsibly." Human Relations Lap 5. IDECC, Inc. The Ohio State University, 1981.

Carvell, Fred J. Human Relations in Business. London: The Macmillan Company, 1970.

Chapman, Elwood N. Your Attitude Is Showing. California: Science Research Associates, Inc., 1977.

Eggland, Steven A., and John W. Williams. Human Relations in Business. Cincinnati: South Western Publishing Company, 1977.

"Positive Attitude." Human Relations LAPS 1, 5, 11. IDECC, Inc. The Ohio State University, 1981.

Weschler, Irving R. Issues in Human Relations Training. Washington: National Training Laboratories, 1962.

UNIT II

TELEPHONE TECHNIQUES

INTRODUCTION

In today's progressive world, one of the most important means of communicating in a business office is the telephone. Therefore, this unit is designed to provide for the development of proper telephone techniques.

Students will participate in activities to develop a telephone personality that will be an asset to any business.

COMPETENCIES

1. Exhibit good telephone techniques.
2. Develop skill and understanding in the use of the telephone directory, special services, and equipment.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Recognize the importance of the telephone in business.
2. Develop good telephone manners.
3. Use telephone directory effectively.
4. Identify special telephone services.
5. Describe uses of special equipment.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. On a written test, students will be able to list at least five reasons why the telephone is important in the business office.
2. In a classroom discussion, students will be able to contribute at least one means of cultivating a good telephone voice.
3. After a classroom discussion, students will be given a list of ten incoming problem calls for which they will write an acceptable method for handling each call.

4. On a performance test, students will be able to record information from incoming calls with 100 percent accuracy.

5. On a written test, students will be able to give at least five suggestions for insuring courtesy on the phone.

6. On a written test, students will be able to apply good language skills when using word endings, adverbs, adjectives, commonly misused words, and spelling with at least 75 percent accuracy.

7. Given a list of 25 situations, students will be able to locate the phone numbers in the telephone directory in 25 minutes with at least 75 percent accuracy.

8. On a written test, using a long-distance rate table, students will be able to compute the cost of completing five telephone calls using station-to-station, direct-dial, and person-to-person rates with at least 75 percent accuracy.

9. Given a copy in class of the long-distance calls made for the previous month, students will be able to prepare an analysis of the number of calls made to each number, the length of each call, the total time for all calls made to the same number, and the total cost of all calls made with a minimum of 90 percent accuracy.

10. On a written test, students will be able to identify different types of outgoing telephone calls with at least 75 percent accuracy.

11. Given a list of twelve types of telephone equipment, students will be able to define them on a written test with at least 75 percent accuracy.

SUGGESTED INTEREST APPROACHES

1. Give a pre-test on the unit to determine students' awareness of the value of good telephone techniques.

2. Invite a representative from local telephone company, the school speech department, and/or the school secretary to speak on the many aspects of telephone technique, equipment, and service.

3. Appoint a committee to write and perform a skit entitled "Telephone Trouble" in which office employees do not cooperate in answering one another's telephone when one is away on break.

4. Use multi-media equipment--tape recorders, films, filmstrips, etc.--to emphasize good telephone technique.

METHODOLOGY

Throughout this unit telephone techniques, equipment and services are incorporated in such a manner as to increase the efficiency of the business office. In addition, content not covered by students' activities or guest participants will be given in lecture form by the instructor. Some of the sources from which the instructor obtains lecture material are listed in the resource section of this unit.

UNIT OUTLINE

TELEPHONE TECHNIQUES

I. Importance of Telephone in Business

   A. Increase productivity
   B. Promote human relations

II. Development of Good Telephone Manners

   A. Voice
   B. Speech
   C. Language skills
   D. Calls received
   E. Calls made
   F. Message taking

III. Effective Use of Telephone Directory

   A. Alphabetic section
   B. Classified section
   C. Introductory section
   D. Consumer information

IV. Effective Use of Special Services

   A. Long-distance calls
   B. Local calls

V. Types of Special Equipment

   A. Switchboards
   B. Special phones
   C. Automatic dialing telephones
   D. New equipment

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

1. On a written test, students will be able to list at least five reasons why the telephone is important in the business office.

Subject Matter Content	Learning Activities
Importance of telephone	1. Relate personal experiences of three calls which you have made to business offices and evaluate (on the checklist) the person who answered the phone. (Appendix A) 2. Compose and type an essay of 200 to 300 words on ways good telephone techniques can improve productivity in an office. 3. Complete the scrambled words exercise on techniques, services, and equipment. (Appendix B) 4. Type a list of money-saving telephone tips from introductory pages of telephone directory. 5. Listen to the experiences of a young college graduate. Discuss in class. (Appendix C)

2. In a classroom discussion, students will be able to contribute at least one means of cultivating a good telephone voice.

Subject Matter Content	Learning Activities
Good telephone voice	1. Divide into groups of two and say aloud the list of numbers using correct pronunciation. (Appendix E) 2. Listen to five different radio announcers and make a list of both good and bad points of their voices and report to the class.

Good telephone voice	3. Draw a card from a group of sentence action cards and record on recorder. Listen and rate on a scale of one to five (with one being the highest) the qualities of good telephone voice. (Appendices F and G)

3. After a classroom discussion, students will be given a list of ten incoming problem calls for which they will write an acceptable method for handling each call.

Subject Matter Content	Learning Activities
Incoming calls	1. Write a script for a situation in which a customer is calling to complain that a washing machine has been broken for three days and that a repair person has not responded. 2. Divide into groups of three and role play the situations involving calls. Evaluate each other on a scale of one to five (with one being the highest). (Appendix H) 3. Relate a personal experience in which a problem call has been handled.

4. On a performance test, students will be able to record information from incoming calls with 100 percent accuracy.

Subject Matter Content	Learning Activities
Incoming calls--persons not at desks	1. Write incoming messages on message forms. (Appendix I) 2. Listen to presentation by guest speaker on new equipment and technology of office telephone systems and be able to indicate the effects they will have on the office.

Incoming calls--persons not at desks	3. Listen to recorded media and write the names which are dictated. (Appendix J)

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5. On a written test, students will be able to give at least five suggestions for insuring courtesy on the phone.

Subject Matter Content	Learning Activities
Telephone courtesy	1. Prepare a bulletin board illustrating telephone courtesy. 2. Listen to teacher-prepared tape on "First Impressions Do Count," and write a description of the person talking. Rate the voice as to effectiveness--negative, positive, or neutral. (Appendix K) 3. Role play the situations in the guide for the teletrainer provided by the local telephone company. 4. Divide into groups and come up with ideas for telephone courtesy and report findings to class. Compile one master list.

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6. On a written test, students will be able to apply good language skills when using word endings, adverbs, adjectives, commonly misused words, and spelling with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Language skills	1. Type twenty sentences using words from a list of twenty misspelled words. (Appendix L) 2. Compose a one-page report on the importance of language skills in a business office. 3. Type correct answers in the blanks on the Language Skill Sheet. (Appendix M)

7. Given a list of 25 situations, students will be able to locate the phone numbers in the telephone directory in 25 minutes with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Telephone directory	1. Index and alphabetize a list of 25 names. (Appendix N) 2. Locate and type 15 important numbers that you think should be kept in all office telephone reference files. 3. Determine and compare the cost of each call on the list for both direct dial and operator-assisted calls. (Appendix O)

8. On a written test using a long-distance rate table, students will be able to compute the cost of completing five telephone calls using station-to-station, direct-dial, and person-to-person rates with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Long-distance calls	1. Show filmstrip obtained from a local phone company on how to place long-distance calls. 2. Determine the cost for each station-to-station and direct-dial call listed. (Appendix P) 3. Write in your own words the method used for 1+ and 0+ dialing.

9. Given a copy in class of the long-distance calls made for the previous month, students will be able to prepare an analysis of the number of calls made to each number, the length of each call, the total time for all calls made to the same number, and the total cost of all calls made with at least 90 percent accuracy.

Subject Matter Content	Learning Activities
Long-distance calls	1. Check time-zone map in telephone directory to find out what time it will be in the cities on the list. (Appendix D) 2. Type a list of directory assistance charges using introductory pages of a telephone directory. 3. Type a list of calls exempt from directory assistance charges and explain why. (Small group activity)

10. On a written test, students will be able to identify different types of outgoing telephone calls with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Outgoing telephone calls	1. Prepare a bulletin board on the types of outgoing telephone calls. 2. Write the words and record the message for a happy 25th anniversary singing call. 3. Complete the word-find puzzle using the terms on the list provided. (Appendix Q)

11. Given a list of twelve types of telephone equipment, students will be able to define them on a written test with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Telephone equipment	1. Complete the word-find puzzle after reviewing the equipment terms. (Reward the first one completed) (Appendix R) 2. Unscramble the words in the exercises on types of telephone equipment. (Reward the first one completed) (Appendix S)

Telephone equipment	3. Identify telephone equipment from pictures on overhead transparencies and give examples of proper uses.
	4. Perform mock telephone situations using teletrainer and teacher's guide. (Have one group evaluate another group's performance.)

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

- Unit test
- Class participation grade
- Student project grade
- Rating sheet grade

EQUIPMENT AND SUPPLIES

Student

- Textbook
- Notebook
- Office Manual
- Telephone Directory
- Rating Sheets
- Instruction Sheets
- Checklists
- Message Forms
- Typing Paper
- Correction Tape
- Pen
- Pencil
- Typewriter
- Calculator

Teacher

- Textbook and Manual
- Telephone Directory
- Tapes, Blank
- Tapes, Recorded
- Bulletin Board Materials
- Construction Paper
- Transparencies
- Transparency Pens
- Rating Sheets
- Filmstrip Projector/Filmstrips
- Overhead Projector
- Tape Recorder
- Teletrainer

APPENDIX A

STUDENT EVALUATION CHECKLIST

TELEPHONE CALLS--PERSONAL EXPERIENCE

EVER ordered merchandise on the phone,
    And the voice that answered made you moan?
OR called for an appointment with Dr. Ledoux,
    And the voice that greeted you was pleasant and helpful, too?
THEN PERSONAL EXPERIENCE has shown to you,
    WHAT GOOD TELEPHONE TECHNIQUES CAN REALLY DO?

Directions: On the following checklist, evaluate three calls which you have made to business offices. Rate the person answering the call on the following scale: 1, excellent; 2, very good; 3, good; 4, fair; and 5, poor. Complete the chart by totaling all three columns and filling in the summary at the bottom of the page.

PART I--

RATE THE PERSON WHO ANSWERED YOUR CALL ON THESE ITEMS	CALL NO. 1	CALL NO. 2	CALL NO. 3
1. USED WELL-MODULATED VOICE			
2. USED GOOD SPEECH			
3. USED GOOD VOCABULARY			
4. WAS COURTEOUS			
5. ANSWERED PROMPTLY			
6. IDENTIFIED COMPANY			
TOTAL			

PART II--Summarize your general impression of the call that received the highest number of points.

____

____

____

APPENDIX B

TELEPHONE TECHNIQUES TERMINOLOGY

SCRAMBLED (RABDSELCM) WORDS

Directions: Rearrange the letters of the scrambled words in the correct order, and you will discover 15 telephone technique terms which are used in this unit. When you have completed all the terms, you may check the correct answers at the bottom of this page.

1. RYUCOVBALA 1. ____________________

2. HOTEEENLP 2. ____________________

3. GMSESSAE 3. ____________________

4. RDETYORCI 4. ____________________

5. TPALCIBHAEAL 5. ____________________

6. HSIDABOWCTR 6. ____________________

7. EOPSEKNAPHER 7. ____________________

8. BLIOME 8. ____________________

9. LGDIANI 9. ____________________

10. FENCERCENO 10. ____________________

11. STOCEYRU 11. ____________________

12. CLETLOC 12. ____________________

13. PRARETOO 13. ____________________

14. NASTCEDI 14. ____________________

15. GIGUNOTO 15. ____________________

Answers: 1. vocabulary 2. telephone 3. messages 4. directory
5. alphabetical 6. switchboard 7. speakerphone 8. mobile
9. dialing 10. conference 11. courtesy 12. collect
13. operator 14. distance 15. outgoing

APPENDIX C

EXPERIENCE

Once upon a time (not too long ago) a college graduate received a diploma and immediately began looking for a teaching position. In each of the application letters sent, a resume' was always included.

One beautiful sunny day while anxiously awaiting a reply from the letters, the graduate received word that there was a job opening in one of the most desirable and highest-paying parishes in our state. Rather than take the time to send another letter, the graduate decided to call the principal and ask for an interview.

Upon calling, the graduate spoke to the secretary who, after talking to the principal, suggested that the applicant come in the next day at 10:00 a.m.

The next day dawned bright and beautiful as he/she gathered his/her letter of application and resume and drove ten miles to the interview. Of course, he/she was dressed properly and was not chewing gum or smoking.

At the school, the applicant was greeted by the secretary who immediately took him/her into the principal's office.

At the end of the interview, the principal gave a little grin and said, "This is a first for me in twenty years. I have a rule that I have always followed--never hire anyone until they've filled out an application form, and I've had sufficient time to study the letter of application and resume. Why did I do it? Because my secretary was so impressed by your voice and pleasant manner after speaking with you on the phone yesterday."

The young applicant was shocked and surprised when the principal offered him/her this wonderful teaching position. Of course, he/she accepted the job and lived happily ever after.

Note:

We can't guarantee that the pleasant voice will always get you the job, but I think we can safely say that it will certainly help open the door. The rest, of course, is always up to you!

APPENDIX D

TELEPHONE DIRECTORY--TIME-ZONE

Directions: In an office it is important that you know about placing calls to other cities before their offices close or after they open. This exercise is designed to give you practice. Use the introductory pages of the telephone directory to locate the map of the United States which shows the time zones. In the proper space provided on the chart, indicate the time the call will reach its destination and if it will get there before the office closes. (Assume all offices are open from 9:00 a.m. until 5:00 p.m.)

YOU ARE MAKING THE CALL FROM YOUR TOWN AT....	YOU ARE MAKING THE CALL TO	IT WILL REACH THAT TOWN AT..	BEFORE CLOSING YES-NO
1. 9:20 a.m.	Reno, NV		
2. 4:45 p.m.	Montgomery, AL		
3. 1:10 p.m.	Seattle, WA		
4. 11:20 a.m.	Raleigh, NC		
5. 2:00 p.m.	Miami, FL		
6. 10:00 a.m.	San Francisco, CA		
7. 12:37 p.m.	Des Moines, IA		
8. 9:15 a.m.	Salem, OR		

APPENDIX E

HOW TO PRONOUNCE NUMBERS

It is very important to enunciate numbers well when placing calls. Therefore, this exercise is designed to help you learn to pronounce the numbers correctly.

Directions: Find a partner and practice saying the numbers to each other. Time: Five minutes.

NUMBERS	SOUNDS TO USE	THEN: SAY
0	long o	oh
1	strong w and n	wun
2	strong t and long oo	too
3	strong r and long ee	th-r-ee
4	long o and strong r	fo-er
5	first i long, second i short, strong v	fi-iv
6	stron s and ks	siks
7	strong s and v, well-rounded en	sev-en
8	long a and strong t	ate
9	strong n, long i and well-rounded en	ni-en

APPENDIX F

SENTENCE ACTION CARDS

Each of the following examples will be put on card stock (3 x 5 cards) and placed in a box. Students will each draw one card out of box, read it to themselves, and record it on tape. Upon completion, students will play back tape and evaluate each other using Appendix G. (Teacher should prepare more of these cards if needed.)

SENTENCE ACTION CARD #1

"Good morning, Mrs. Mortimer. Is Dr. James in today? May I speak with him, please?"

SENTENCE ACTION CARD #2

"Thank you for calling, Mr. Jones. I'll be sure to give Mr. Hartman your message as soon as he returns."

SENTENCE ACTION CARD #3

"Mr. Owens is no longer at this extension. He can be reached in the Accounting Department, Extension 631. Just a moment, please, and I'll have the operator transfer your call."

SENTENCE ACTION CARD #4

It is very important when you use the phone that you know what you want to say. Remember time is valuable in a business office.

SENTENCE ACTION CARD #5

When taking messages on a phone, be sure that you always have the proper supplies on hand--memo forms, paper, and pens. Do not keep the caller on "hold" while you look for supplies.

SENTENCE ACTION CARD #6

For long distance calls some businesses have a "WATS" line. WATS stands for Wide Area Telecommunications Service. With WATS a business pays a fixed monthly charge regardless of the number of calls made.

SENTENCE ACTION CARD #7

"I'm sorry, she's busy with another customer. I called the service department, and they said that your service contract expired on the last day of July."

SENTENCE ACTION CARD #8

What should a message contain? It should include the name and phone number (extension, if applicable) of the caller and some brief explanation as to the reason for the call.

SENTENCE ACTION CARD #9

How a receptionist answers a phone depends on the place of employment. In a large company, employees answer calls by giving their own name or by saying the name of the department and then their name.

SENTENCE ACTION CARD #10

A receptionist should know how to prepare for and make a call; how to answer the phone; how to take messages; how to close a call; and how to handle the messages.

APPENDIX G

SENTENCE ACTION CARDS RATING SHEET

Directions: From the tape recording, rate students on a scale of one to five (with one being the highest).

	VOICE				
Name of Student	Proper Word Emphasis	Proper Pace	Distinctly Spoken	Proper Tone	Proper Inflection

APPENDIX H

INCOMING CALLS--ROLE PLAYING

RATING SHEET

Directions: Evaluate each group on the following criteria: answered promptly, identified self, was courteous, used good speech, used well-modulated voice, used good vocabulary. Use a scale of one to five with one being the highest.

	GROUP						
	1	2	3	4	5	6	7
ANSWERED PROMPTLY							
IDENTIFIED SELF							
WAS COURTEOUS							
USED GOOD SPEECH							
USED WELL-MODULATED VOICE							
USED GOOD VOCABULARY							
TOTAL							

APPENDIX I

INCOMING MESSAGES--MESSAGE FORMS

Directions: The following calls came in today (use current date) while the persons called were not at their desks. Use the information given below to fill out the message forms.

CALL NO. 1---Marcus Baker called Eugene McIntyre at 10:05 a.m. asking for an interview for the position of secretary. He would like Mr. McIntyre to call him before 5:00 p.m. today to let him know about the interview--phone 972-8413.

CALL NO. 2---June Evans called Jim Carlson at 9:45 a.m She needs some advice on a problem. She will call back at 11:15 a.m. as Jim will be out of his office until that time.

CALL NO. 3---Mary Snyder called to remind her husband, Larry, that they would be having guests (Mr. and Mrs. Davis) for dinner tonight and to be sure to pick up the flowers from the florist. Call came at 1 p.m.

TO: ______________________________

A MESSAGE FOR YOU

From ______________________________

of ______________________________

Phone No. ____________________ Ext. __________

_____ Telephoned _____ Will call again

_____ Returned your call _____ Came to see you

_____ Please phone ____ Wants to see you

____

____

____

____

Taken by	Date	Time

APPENDIX I

ANSWER KEY

CALL NO. 1 TO: Eugene McIntyre

A MESSAGE FOR YOU

From Marcus Baker

of

Phone No. 972-8413 Ext.

☒ Telephoned

☐ Returned your call

☒ Please phone

☐ Will call again

☐ Came to see you

☐ Wants to see you

Interview for secretary

Call before 5:00 today

Taken by	Date	Time
a. Student	(current)	10:05 a.m.

APPENDIX I

ANSWER KEY

CALL NO. 2 TO: Jim Carlson

A MESSAGE FOR YOU

From June Evans

of

Phone No. Ext.

X Telephoned X Will call again

___ Returned your call ___ Came to see you

___ Please phone ___ Wants to see you

Call back at 11:15

Taken by	Date	Time
a. Student	(current)	9:45 a.m.

APPENDIX I

ANSWER KEY

CALL NO. 3 TO: Larry Snyder

A MESSAGE FOR YOU

From Mary Snyder

of

Phone No. Ext.

X Telephoned

Will call again

Returned your call

Came to see you

Please phone

Wants to see you

Mr. and Mrs. Davis coming to dinner

Pick up flowers

Taken by a. Student	Date (current)	Time 1:00 p.m.

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APPENDIX J

NAMES--ORAL DICTATION (Spelling)

Directions: Dictate the following names either orally or have on tape.

1. Charles Culbertson
2. Henry Rodrique
3. Sam Smith
4. Dennis Yeager
5. Denise Woodward
6. Joe Griffith
7. Mary Harrison
8. Barry Neilsen
9. Johnny Oliver
10. Kenneth Powers
11. Robert Glass
12. Albert Snyder
13. R. L. Gunther
14. Amelia Perry
15. Jennifer Moxley
16. Hilda Swenson
17. Suzanne Turner
18. David Parker
19. Ellen Tompkins
20. Michael Wilson

APPENDIX K

FIRST IMPRESSIONS DO COUNT

Directions: As you listen to the voices on the tape, form a mental picture of what this person looks like, how he/she is dressed, etc. Then write down your description of that person and rate the voice negative, positive, or neutral.

VOICE NO. 1:

Describe ____

____

____

____

____

RATE: ________ NEGATIVE ________ POSITIVE ________ NEUTRAL

VOICE NO. 2:

Describe ____

____

____

____

____

RATE: ________ NEGATIVE ________ POSITIVE ________ NEUTRAL

VOICE NO. 3:

Describe ____

____

____

____

____

RATE: ________ NEGATIVE ________ POSITIVE ________ NEUTRAL

APPENDIX L

LANGUAGE SKILLS--MISSPELLED WORDS

Directions: The twenty words given below are misspelled. Spell each word correctly; then use it in a sentence. Watch spelling and punctuation. Use typewriters and dictionaries.

1. operater
2. transfering
3. direct-diel calls
4. alphebetically
5. directery
6. terminateing
7. voice infliction
8. acurately
9. extention
10. unecessary
11. automaticaly
12. conferance
13. techiniques
14. distinkly
15. mobil phone
16. nonimal
17. maintanence
18. enuncation
19. recepionist
20. courtous

APPENDIX M

LANGUAGE SKILL SHEET

Directions: For each of the following exercises, follow the directions:

A. ADVERBS AND ADJECTIVES--Underline the correct answer.

1. The call from California arrived (sooner, soonest) than we expected.
2. Can you dial (fast, faster) on the dial phone than you can on the Touch-Tone telephone?
3. I think this telephone is (better, best).
4. Ginger learned to use the computer (most rapidly, more rapidly) than anyone in the class.
5. John listened (most carefully, carefully) to the oral instructions for placing a long-distance call.

B. MISUSED WORDS--Underline the correct answer.

1. The FBLA'ers were (all ready, already) to leave for the district conference early this morning.
2. The package had (already, all ready) arrived by the time I arrived at the post office.
3. When the phone rang, Susie hurried (into, in to) the office to answer it.
4. Please (set, sit) the telephone directory on my desk.
5. Phone rates are expected to (rise, raise) in the near future.

C. ING ENDINGS--Add "ing" to the following words.

1. travel 1. ______________________________

2. cancel 2. ______________________________

3. proceed 3. ______________________________

4. convey 4. ______________________________

5. identify 5. ______________________________

6. disconnect 6. ______________________________

7. expedite 7. ______________________________

8. compute 8. ______________________________

APPENDIX N

INDEX AND ALPHABETIZE

Directions: On 3 x 5 slips of paper index the following names and then alphabetize them.

1. Alfred A. Wheaton
2. Allen Bellzer, Jr.
3. Harbor Seafood Restaurant
4. Daniel Lightfoot
5. Andrew R. Rulf
6. Russell J. Caldwell
7. Rhonda Carstairs
8. Danny's Fried Chicken
9. John David Ratcliff, III
10. Rupert Hopkins
11. Louis A. Jacobsen
12. Frank D. Mannering
13. Walter L. Lewis
14. Joe's Boots and Work Clothes
15. Sam's Firestone Safety Center
16. James Freeman, Sr.
17. W. C. Felderman
18. Virginia Ann Valentine
19. C K Enterprise
20. L. N. Tanner
21. Walter O'Keefe
22. Beulah Ann Johnson
23. L. R. Johnston
24. Larry R. Johnsen
25. Angela Nell Standsbury

ANSWER KEY

APPENDICES L, M, AND N

APPENDIX L

1. operator
2. transferring
3. direct-dial calls
4. alphabetically
5. directory
6. terminating
7. voice inflection
8. accurately
9. extension
10. unnecessary
11. automatically
12. conference
13. techniques
14. distinctly
15. mobile phone
16. nominal
17. maintenance
18. enunciation
19. receptionist
20. courteous

APPENDIX M

A. 1. sooner
2. faster
3. best
4. more rapidly
5. carefully

B. 1. all ready
2. already
3. into
4. set
5. rise

C. 1. travelling or traveling
2. cancelling or canceling
3. proceeding
4. conveying
5. identifying
6. disconnecting
7. expediting
8. computing

APPENDIX N

1. Bellzer, Allen (Jr.)
2. C K Enterprise
3. Caldwell, Russell J.
4. Carstairs, Rhonda
5. Danny's Fried Chicken
6. Felderman, W. C.
7. Freeman, James (Sr.)
8. Harbor Seafood Restaurant
9. Hopkins, Rupert
10. Jacobsen, Louis A.
11. Joe's Boots and Work Clothes
12. Johnsen, Larry R.
13. Johnson, Beulah Ann
14. Johnston, L. R.
15. Lewis, Walter L.
16. Lightfoot, Daniel
17. Mannering, Frank D.
18. O'Keefe, Walter
19. Ratcliff, John David (III)
20. Rulf, Andrew R.
21. Sam's Firestone Safety Center
22. Standsbury, Angela Nell
23. Tanner, L. N.
24. Valentine, Virginia Ann
25. Wheaton, Alfred A.

APPENDIX O

LONG-DISTANCE CALLS

Directions: Determine the cost of each of the calls given below. Use the table in the telephone directory.

FROM YOUR CITY TO:	Day	Length of Time	Time	Dial Direct	OPERATOR	
					Station to Station	Person-to-Person
Atlanta, GA 30300	Mon.	5	9 a.m.			
Chicago, IL 60600	Wed.	5	8 p.m.			
Houston, TX 77000	Fri.	5	11:15 a.m.			
St. Louis, MO 63100	Sat.	3	6 p.m.			
Seattle, WA 98100	Sun.	3	8 a.m.			

APPENDIX P

LONG-DISTANCE CALLS

Directions: All the calls below were made on Monday through Friday between the hours of nine and five for a period of three minutes. Compute the cost of each call using information from telephone directory.

FROM YOUR CITY TO:	STATION-TO-STATION	DIRECT-DIAL
Atlantic City, NJ 08404		
Boston, MA 02100		
Detroit, MI 48200		
Philadelphia, PA 19100		
Washington, DC 20000		

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APPENDIX Q

WORD-FIND PUZZLE

Directions: Circle the list of words in the puzzle given below. Words can be found horizontally, vertically, or diagonally.

WORD LIST: Answering, automatic, bellboy, call, card dialer, collect, cordiess, courtesy, direct dial, identifying, incoming, key, manner, mobile phone, operator, outgoing, PBX, service, telephone, Touch-A-Matic, time, vocabulary, voice, WATS, yellow pages, zone

---

C	A	R	D	D	I	A	L	E	R	X	O	P	E	R	A	T	O	R	Y	Z	O
K	E	Y	A	B	Y	O	B	L	L	E	B	C	D	S	S	E	L	D	R	O	C
S	F	D	E	F	I	G	T	H	I	N	C	O	M	I	N	G	I	C	A	L	L
W	J	K	L	C	D	M	O	N	A	N	S	W	E	R	I	N	G	O	P	Q	R
I	C	S	T	I	E	U	U	V	W	X	M	O	B	I	L	E	P	H	O	N	E
T	O	Y	Z	T	N	A	C	B	C	D	E	E	F	G	H	S	I	T	I	M	E
C	U	J	K	A	T	L	H	M	N	O	C	P	P	Q	E	R	S	T	U	M	V
H	R	E	W	M	I	X	A	Y	Z	I	A	B	B	G	C	D	E	F	G	A	H
B	T	N	I	O	F	J	M	K	O	L	M	X	A	O	P	E	Q	R	S	N	T
O	E	O	T	T	Y	U	A	V	V	W	X	P	Y	X	A	B	S	C	D	N	E
A	S	H	C	U	I	F	T	G	H	I	W	J	W	A	T	S	K	S	L	E	M
R	Y	P	E	A	N	N	I	O	P	O	Q	R	Z	O	N	E	S	T	A	R	E
D	U	E	L	V	G	W	C	X	L	Y	O	U	T	G	O	I	N	G	G	G	Z
A	B	L	L	C	D	E	F	L	V	O	C	A	B	U	L	A	R	Y	H	I	J
K	L	E	O	M	N	O	E	P	Q	R	S	T	U	V	E	C	I	V	R	E	S
W	X	T	C	Y	Z	Y	A	B	D	I	R	E	C	T	D	I	A	L	C	D	E

APPENDIX R

WORD-FIND PUZZLE

Directions: Circle the list of words in the puzzle given below. Words can be found horizontally, vertically, or diagonally.

WORD LIST: central, classified, conference, card, credit, data-phone, equipment, exchange, eastern, information, local, mountain, overseas, Pacific, private, station-to-station, person-to-person, teletypewriter, cord

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T	E	L	E	E	Y	P	E	W	R	I	T	E	R	O	C
R	X	D	A	T	A	P	H	O	N	E	R	T	P	S	T
B	W	Y	B	K	L	O	M	C	O	R	D	E	E	S	U
C	R	E	D	I	T	N	E	N	O	P	Q	L	R	T	V
G	V	Z	P	C	C	E	Q	C	V	E	Q	E	S	A	E
C	U	A	A	L	R	A	U	E	E	G	N	T	O	T	C
A	T	P	C	A	D	S	I	N	R	N	I	Y	N	I	N
R	S	R	I	S	L	T	P	T	S	A	A	P	T	O	E
D	R	I	F	S	A	E	M	R	E	H	T	E	O	N	R
H	Q	V	I	I	C	R	E	A	A	C	N	W	P	W	E
I	P	A	C	F	O	N	N	L	S	X	U	R	E	X	F
J	O	T	P	I	L	E	T	K	L	E	O	I	R	Y	N
K	N	E	J	E	I	H	F	J	Z	M	M	T	S	A	O
L	M	I	H	D	F	G	G	C	R	D	D	E	O	B	C
N	O	I	T	A	M	R	O	F	N	I	E	R	N	C	D
S	T	A	T	I	O	N	T	O	S	T	A	T	I	O	N

APPENDIX Q

WORD-FIND PUZZLE ANSWER KEY

Directions: Circle the list of words in the puzzle given below. Words can be found horizontally, vertically, or diagonally.

WORD LIST: Answering, automatic, bellboy, call, card dialer, collect, cordless, courtesy, direct dial, identifying, incoming, key, manner, mobile phone, operator, outgoing, PBX, service, telephone, Touch-A-Matic, time, vocabulary, voice, WATS, yellow pages, zone

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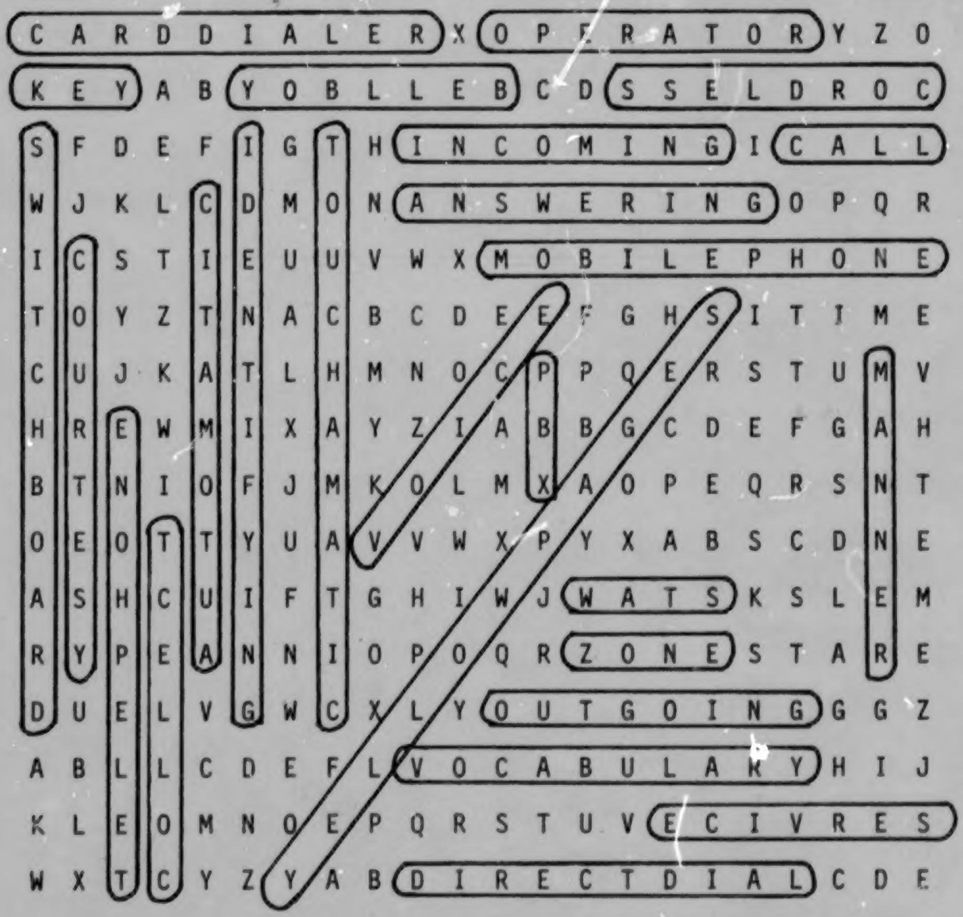

C A R D D I A L E R X O P E R A T O R Y Z O
K E Y A B Y O B L L E B C D S S E L D R O C
S F D E F I G T H I N C O M I N G I C A L L
W J K L C D M O N A N S W E R I N G O P Q R
I C S T I E U U V W X M O B I L E P H O N E
T O Y Z T N A C B C D E E F G H S I T I M E
C U J K A T L H M N O C P P Q E R S T U M V
H R E W M I X A Y Z I A B B G C D E F G A H
B T N I O F J M K O L M X A O P E Q R S N T
O E O T T Y U A V V W X P Y X A B S C D N E
A S H C U I F T G H I W J W A T S K S L E M
R Y P E A N N I O P O Q R Z O N E S T A R E
D U E L V G W C X L Y O U T G O I N G G G Z
A B L L C D E F L V O C A B U L A R Y H I J
K L E O M N O E P Q R S T U V E C I V R E S
W X T C Y Z Y A B D I R E C T D I A L C D E

APPENDIX R

WORD-FIND PUZZLE ANSWER KEY

Directions: Circle the list of words in the puzzle given below. Words can be found horizontally, vertically, or diagonally.

WORD LIST: central, classified, conference, card, credit, data-phone, equipment, exchange, eastern, information, local, mountain, overseas, Pacific, private, station-to-station, person-to-person, teletypewriter, cord

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T	E	L	E	E	Y	P	E	W	R	I	T	E	R	O	C
R	X	D	A	T	A	P	H	O	N	E	R	T	P	S	T
B	W	Y	B	K	L	O	M	C	O	R	D	E	E	S	U
C	R	E	D	I	T	N	E	N	O	P	Q	L	R	T	V
G	V	Z	P	C	C	E	Q	C	V	E	Q	E	S	A	E
C	U	A	A	L	R	A	U	E	E	G	N	T	O	T	C
A	T	P	C	A	D	S	I	N	R	N	I	Y	N	I	N
R	S	R	I	S	L	T	P	T	S	A	A	P	T	O	E
D	R	I	F	S	A	E	M	R	E	H	T	E	O	N	R
H	Q	V	I	I	C	R	E	A	A	C	N	W	P	W	E
I	P	A	C	F	O	N	N	L	S	X	U	R	E	X	F
J	O	T	P	I	L	E	T	K	L	E	O	I	R	Y	N
K	N	E	J	E	I	H	F	J	Z	M	M	T	S	A	O
L	M	I	H	D	F	G	G	C	R	D	D	E	O	B	C
N	O	I	T	A	M	R	O	F	N	I	E	R	N	C	D
S	T	A	T	I	O	N	T	O	S	T	A	T	I	O	N

APPENDIX S

SCRAMBLED WORDS

Directions: Unscramble the words, find the hidden telephone terms, and place in the blank provided.

1. TRIPELTEETERWY 1. ______________________
2. AATD-ENOHP 2. ______________________
3. MUCATTAOI 3. ______________________
4. HTCOU-OENT 4. ______________________
5. LALC RTEIDRCO 5. ______________________
6. ODESCRLS 6. ______________________
7. RDAC EADIRL 7. ______________________
8. GIRFNRTASERN 8. ______________________
9. YBLBELO 9. ______________________
10. MYSTES 10. ______________________
11. RTROAY IDAL 11. ______________________
12. LOHD YEK 12. ______________________
13. COUTH-A-CMITA 13. ______________________

Answers: 1. teletypewriter 2. data-phone 3. automatic 4. touch-tone 5. call director 6. cordless 7. card dialer 8. transferring 9. bellboy 10. system 11. rotary dial 12. hold key 13. touch-a-matic.

SUPPLEMENTARY MATERIALS

Cassettes

The Business of Oral Communication
E956 (20 audio cassettes)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Filmstrips

Proper Telephone Techniques
CWFS 105 (2 color filmstrips, 1 cassette)
Career Aids, Inc.
8950 Lurline Avenue
Dept. S8
Chatsworth, CA 91311

Thank You, Please Call Again
South Central Bell
Local Office

Telephone Communications
ZR1183 (2 color filmstrips, 2 cassettes, reproduction masters)
Prentice-Hall Media
ServCode ZR
150 White Plains Road
Tarrytown, NY 10591

Slides, Transparencies, with Cassette

Telephone Techniques for the Secretary
ML1351 (27 (35mm.) color slides, 12 transparencies, with 1 cassette)
Career Aids, Inc.
8950 Lurline Avenue
Dept. S8
Chatsworth, CA 91311

16 MM. Film

If the Shoe Fits
South Central Bell

RESOURCES

Dreher, Barbara. "Groom Your Speech." Today's Secretary, October, 1967, pp. 37 and 72.

Goozner, Calman. Clerical Practice Skills. New York: Amsco School Publications, Inc., 1978.

Hayes, Annette. "The Overlooked Skill--Business Telephone Techniques." The Balance Sheet, October, 1978, pp. 59 and 91.

Jennings, Lucy Mae. Secretarial and Administrative Procedures. Englewood Cliffs: Prentice-Hall, Inc., 1978.

Kray, Eugene. "A New Telephone Learning Technique." The Balance Sheet, December, 1964, p. 192.

Mandel, Milton A. "Telephone Performance Tests." The Balance Sheet, May, 1963, pp. 398 and 420.

Pasewark, Williams R. and Mary Ellen Oliverio. Clerical Office Procedures. Cincinnati: South-Western Publishing Company, 1978.

Stewart, Jeffery R., Jr., et al. Office Procedures. Dallas: McGraw-Hill Book Company, 1980.

Tolhuizen, James H. "Communication Habits: A Plan for Change," Business Education Forum, May, 1981, pp. 24-25.

Uthe, Elaine F. "New Communication Skills in the Age of Interfacing," Business Education Forum, March, 1981, pp. 11-13.

UNIT III

WORD PROCESSING CONCEPTS AND HANDS-ON EXPERIENCE

INTRODUCTION

With the ever-increasing growth in office technology, it is necessary that today's students be prepared for the changes they will encounter in the business world. This unit is designed to expose students to word processing, records management, reprographics, machine transcription, and the merger of data processing and word processing.

Students will be given activities that will enable them to demonstrate their knowledge and skills in all areas of word processing.

COMPETENCIES

1. Exhibit understanding of word processing concepts.
2. Describe the procedures involved in records management, reprographics, and machine transcription.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Use the various filing systems.
2. Describe the reprographics alternatives.
3. Recognize microfilming procedures.
4. Transcribe machine dictation.
5. Exhibit understanding of the merger of data and word processing.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. Given a group of documents in class, the students will be able to index, code, cross-reference, sort, and store the documents alphabetically, geographically, numerically, and by subject with at least 75 percent accuracy.
2. Given a list of filing equipment and supplies and a list of descriptions, the students will be able to choose the description that best defines the equipment and supplies on a written test with at least 75 percent accuracy.

3. Given a list of steps involved in a charge-out system, the students will be able to put these items in correct order in class with at least 75 percent accuracy.

4. Given a list of terms and definitions relating to micrographics on a written test, the students will be able to match them in with at least 75 percent accuracy.

5. Given a list of items and the number of copies to be reproduced, the students will be able to select on a written test the most appropriate method with at least 75 percent accuracy.

6. Given supplies and two documents in class, the students will be able to prepare masters or stencils for duplication in acceptable form. (Prepare for available equipment--mimeograph, fluid duplicator, offset.)

7. Given a prepared stencil and a prepared master, the students will be able to reproduce in class 100 legible copies of the stencil and/or 25 legible copies. A checklist will be used for evaluation.

8. Given a mimeograph or spirit duplicating machine and necessary cleaning supplies, the students will be able to clean machine in class and demonstrate adding fluid or ink with at least 75 percent accuracy.

9. Given one cassette containing three items, the students will be able to transcribe the items in a class period with at least 75 percent accuracy.

10. In a classroom discussion, the students will be able to explain data processing and word processing and how they have merged.

SUGGESTED INTEREST APPROACHES

1. Invite a representative from a local business where word processing equipment is used to talk with students about the importance of word processing and the job opportunities.

2. Secure word processing equipment for use in classroom demonstration and/or use.

3. Visit a local business using word processing equipment to expose students to word processing procedures.

METHODOLOGY

This unit has been designed to enable business students to function in the changing office environment. Teacher lecture will provide content not included in group activities. Textbooks will provide most of the information needed for classroom instruction. Hands-on experience will be provided through various activities.

UNIT OUTLINE

WORD PROCESSING CONCEPTS AND HANDS-ON EXPERIENCE

I. Word Processing
   A. Cycle
   B. Equipment
   C. Terminology

II. Records Management
   A. Filing systems
      1. alphabetic
      2. numeric
      3. geographic
      4. subject
   B. Filing equipment
      1. vertical
      2. lateral
      3. open-shelf
      4. commercial
      5. other
   C. Filing supplies
      1. folders
      2. guides
      3. labels
      4. other
   D. Records control
   E. Micrographics
      1. definition
      2. types
         (a) roll film
         (b) aperture cards
         (c) microfilm jackets
         (d) microfiche
      3. advantages
      4. disadvantages

III. Reprographics

   A. Definition
   B. Processes
      1. carbon
      2. copier
      3. fluid
      4. stencil
      5. offset
      6. new techniques
   C. Machine use, operation, and maintenance

IV. Machine Transcription

   A. Introduction to transcription
      1. equipment
      2. machine operation
   B. Letter transcription

V. Merging of Word Processing and Data Processing

   A. Comparison
   B. Merger

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

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1. Given a group of documents in class, the students will be able to index, code, cross-reference, sort, and store the documents alphabetically, geographically, numerically, and by subject with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Filing systems and rules	1. Write a paragraph describing a world without filing. (Appendix A) 2. Answer roll by stating your name in indexing order. 3. Index, code, cross-reference, sort, and store letters from typing and shorthand classes. 4. Prepare 3 x 5 cards for each of 50 items in proper indexing form and alphabetize. (Appendix B) 5. Complete filing practice set, except for jobs relating to charge-out.

2. Given a list of filing equipment and supplies and a list of descriptions, the students will be able to choose the description that best defines the equipment and supplies on a written test with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Filing equipment and supplies	1. Prepare a packet of filing supplies. 2. Type labels and affix to folders using "Time and Motion" project. (Appendix C) 3. Complete matching exercise of equipment and supplies. (Appendix D)

3. Given a list of steps involved in a charge-out system, the students will be able to put these items in correct order in class with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Records control	1. Complete "On-the-Job Filing" project. (Appendix E) 2. Complete charge-out job in filing practice set. 3. Prepare a report to be presented orally on records management and control at your training station.

4. Given a list of terms and definitions relating to micrographics on a written test, the students will be able to match them with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Micrographics	1. Prepare a list of terms relating to micrographics. 2. Prepare a list of the advantages of micrographics.

Micrographics	3. Complete a matching exercise on micrographics. (Appendix F)

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5. Given a list of items and the number of copies to be reproduced, the students will be able to select on a written test the most appropriate method with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Reprographics processes	1. Complete the matching exercise of terms relating to reprographics. (Appendix G) 2. Determine whether the statement is an advantage or disadvantage and to which process each applies. (Appendix H) 3. Choose the correct copying process for a given situation. (Appendix I)

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6. Given supplies and two documents in class, the students will be able to prepare masters or stencils for duplication in acceptable form. (Prepare for available equipment--mimeograph, fluid duplicator, offset.)

Subject Matter Content	Learning Activities
Machine use, operation, and maintenance	1. View a film on fluid duplication. (See supplementary materials.) 2. View a film on preparing a stencil. (See supplementary materials.) 3. Participate in the "Tag Quiz" contest. (Appendix J) 4. Prepare a newsletter about the courses offered in the business department on a stencil and/or master. 5. Prepare an announcement concerning the school's open house on a stencil and/or master.

7. Given a prepared stencil and a prepared master, the students will be able to reproduce in class 100 legible copies of the stencil and/or 25 legible copies of the master with at least 75 percent accuracy. A checklist will be used for evaluation.

Subject Matter Content	Learning Activities
Machine operation	1. View a filmstrip on operating the fluid duplicator. (See supplementary materials.) 2. View a filmstrip on operating a mimeograph duplicator. (See supplementary materials.) 3. Prepare a bulletin board to show the steps in duplicating and to exhibit work. 4. Use checklist provided for duplicating machine operation. (Appendices K, L, M, N)

8. Given a mimeograph or spirit duplicating machine and necessary cleaning supplies, the students will be able to clean machine in class and demonstrate adding fluid or ink with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Machine maintenance	1. Report orally on the care and cleaning of each type of reprographics equipment. 2. List the supplies needed for machine operation and cleaning. 3. Demonstrate the proper cleaning techniques for each type of duplicating equipment according to standards specified by manufacturer.

9. Given one cassette containing three items, the students will be able to transcribe the items in a class period with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Machine transcription	1. View a film on machine transcription. (See supplementary materials.) 2. Survey the businesses in the community to determine which transcribers are most often used. 3. Read the accompanying instruction book for the transcriber and go through the steps for transcribing. 4. Listen to "Office-style" dictation from several principals to introduce various techniques of dictation. 5. Transcribe assigned cassettes, minicassettes, disc cartridges, and/or magnetic belts in mailable form at the rate of at least 25 words a minute. 6. Edit a rough-draft transcript from a selected cassette, minicassette, magnetic disc, disc cartridge, and/or magnetic belt and prepare a final copy.

10. In a classroom discussion, students will be able to explain data processing and word processing and how they have merged.

Subject Matter Content	Learning Activities
Merger of word processing and data processing	1. Construct a crossword puzzle with the terms associated with word processing and data processing. 2. Prepare a list of job opportunities for word processing and data processing from your local newspaper.

Merger of word processing and data processing	3. Compile a list of career opportunities which have evolved from the merger of data processing and word processing. 4. Outline an article published in a current magazine relating to word processing and/or data processing.

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

- Unit test
- Project grades
- Rating Sheets

EQUIPMENT AND SUPPLIES

Student

Textbook
Notebook
Filing Practice Set
Activity Sheets
Rating Sheets
Transcribing Equipment and Supplies
Typewriter
Typing Paper
Filing Supplies

Teacher

Textbook and Manual
Bulletin Board Supplies
Rating Sheets
Practice Set and Manual
Activity Sheets
Transparencies
Overhead Projector
Duplicating Equipment, Supplies, and Manuals
Tape Recorder and Tapes
Filmstrips and Projector
Transcribing Equipment, Supplies, and Manuals
Office Supply Catalog

APPENDIX A

Suggested items that may aid students in writing a paragraph describing a world without filing.

1. No way to organize and find books in a library.
2. No system for organizing students' records.
3. No table of contents in books.
4. No system for inventory records in stores.
5. No way to locate medical records of patients.
6. No organization of social security numbers.

APPENDIX B

FILING EXERCISE

Directions

On 3 x 5 cards, properly index the following items and then place them in alphabetical order.

1. John Allen, Jr.
2. M. G. Baine
3. Mrs. Virginia Reese Baine (Mrs. Elmer Baine)
4. Mr. Morris A. Brothers
5. Mr. Lorenzo N. D'Arcy
6. Mr. Geo. S. De Vries, Atlanta
7. Mr. Richard Ensley
8. Mr. George E. Be Bout
9. Mr. Chas. E. Anders-Clarke
10. Mr. Morris Arnold Brothers
11. Mr. Roy C. Baine
12. Mr. Robert K. Ensley
13. Brother Robt. L. Ensley
14. Mr. John E. Allen
15. Rabbi Morris Brothers
16. Chang Foo Ban
17. Mr. Geo. S. De Vries, Boston
18. Mr. James R. Bell, Oxford
19. Miss Claire E. Anders
20. Rev. James R. Bell, New Orleans
21. Brother David
22. Mr. Ron D. Childe
23. A. R. Childers
24. Mr. Charles Cirin, Jr.
25. Mr. Oswald W. Craig-Smythe
26. Mr. Charles Cirin, Sr.
27. Pan-American Shipping Company
28. Queen Ann Fabrics
29. R & A Leather Company
30. Radio and Television Repairs
31. R-U Insurance Agency
32. Queen's Luster Ware
33. Sail-or-Motor Boats, Inc.
34. Mrs. Lucille Ray Ruebro
35. Sailors' Home-From-Home
36. Mr. Steve Ruebro
37. Sailor's Home
38. The 1050 Restaurant
39. Terre Haute Laundry
40. Van Der Veer Toy Shop
41. The Abingdon Daily News, Abingdon, NJ
42. James Abingdon Elementary School
43. Division of Social Administration State Dept. of Public Welfare, Montgomery, Alabama
44. State Fisheries Agency, Juneau, Alaska
45. Parks and Playgrounds Dept., Alexandria, LA
46. Merchants Bank, Shreveport, LA
47. Merchants Bank, Monroe, LA, 102 Smith Street
48. Merchants Bank, Monroe, LA, 200 Smith Street
49. Merchants Bank, Monroe, LA, 344 Steel Street
50. U. S. Dept. of Agriculture

APPENDIX B -- ANSWER KEY

FILING EXERCISE

1. 41
2. 42
3. 43
4. 44
5. 45
6. 1
7. 14
8. 19
9. 9
10. 3A
11. 2
12. 11
13. 3
14. 16
15. 8
16. 20
17. 18
18. 21
19. 15
20. 4
21. 10
22. 16A
23. 22
24. 23
25. 24
26. 26
27. 25
28. 5
29. 6
30. 17
31. 7
32. 12
33. 13
34. 47
35. 48
36. 49
37. 46
38. 27
39. 28
40. 32
41. 29
42. 31
43. 30
44. 34
45. 36
46. 33
47. 37
48. 35
49. 38
50. 39
51. 50
52. 40

APPENDIX C

TIME AND MOTION STUDY

Supplies:	Strip of 6 roll labels 6 self-adhesive labels 10 3 x 5 cards

1. On a strip of roll labels, type the following five folder titles and attach the labels to the cards while being timed.

   Bridges, Alfred
   Covington Building Supply
   Downeyville Boutique (The)
   Evers, John, Lumber Company
   Lawrence (the) Barber

2. On the self-adhesive labels, type the same five folder titles and attach the labels to the cards while being timed.

3. Compare the times.

APPENDIX D

FILING EQUIPMENT AND SUPPLIES

Match the following.

____ 1. Heavy cardboard sheets which are used when charging out papers from the files.

____ 2. Looks like a chest of drawers and are frequently used as area dividers.

____ 3. Provides a reminder of things a secretary is to do or things she should call to her employer's attention.

____ 4. Contains material for more than one person or firm.

____ 5. Typical pull-out drawer file cabinet.

____ 6. Contains material to or from one person or firm.

____ 7. Gummed or adhesive strips on which captions are typed or printed.

____ 8. Contains materials relating to one specific area.

____ 9. Papers are held in folders placed on shelves in an upright position.

____ 10. Heavy cardboard sheets which are the same size as the folders.

a. Vertical files

b. Lateral files

c. Shelf files

d. Guides

e. Miscellaneous folders

f. Individual folders

g. Special folders

h. Labels

i. Out guides

j. Tickler file

ANSWER KEY

APPENDIX D

1. I
2. B
3. J
4. E
5. A
6. F
7. H
8. G
9. C
10. D

APPENDIX F

1. C
2. B
3. F
4. A
5. E
6. D

APPENDIX G

1. E
2. A
3. C
4. G
5. B
6. D
7. F

APPENDIX I

1. fluid
2. carbon
3. stencil
4. fluid
5. stencil
6. copier
7. stencil
8. carbon
9. offset
10. offset

APPENDIX E

ON-THE-JOB FILING

Divide into five groups. Each group will be assigned the following job titles: a supervisor, typist, receptionist, and file clerk. Each group will be provided with the following supplies: 2 typewriters or felt tip pens, 1 file drawer, 20 file folders, 20 plastic tabs, 20 labels, file sorter, date stamp and pad, and 30 pieces of correspondence. Each group will set up an alphabetic filing system.

The instructor will then distribute five identical sets of correspondence to each receptionist. The incoming mail is date-stamped and given to the supervisor. The supervisor will read the mail and release it for filing. The clerk and typist will examine, code, and store the material.

When all groups have completed the task assigned, the instructor will ask them to retrieve certain pieces of correspondence while being timed. Each group can then rotate and locate correspondence using the filing system set up by another group.

APPENDIX F

MICROGRAPHICS

Match the following.

_____ 1. A 4 x 6 sheet of microfilm that can contain 98 business documents reduced 24 times.

_____ 2. Clear folder into which microfilm can be inserted.

_____ 3. Makes it possible to place information stored in a computer onto microfilm.

_____ 4. Process of photographically reducing information to some type of film.

_____ 5. Oldest and most economical method of microfilming.

_____ 6. Card on which a strip or frame of microfilm is mounted.

a. Micrographics

b. Microfilm jackets

c. Microfiche

d. Aperture card

e. Roll film

f. COM

APPENDIX G

Match the following terms and definitions.

_____1. A part of the graphic arts that is concerned with duplication in the office.

_____2. Composition by machines such as typewriters or other photocomposing machines.

_____3. The order of written material, pictures, illustrations, and other art work on a page.

_____4. The process of securing copy, pictures, etc., to put on sheets. This is trimming and positioning the copy and illustrations, then affixing by means of rubber cement, tape, or wax.

_____5. The copy is typed directly on a master with a second sheet containing aniline dye which makes a reverse image on the back of the master. Copies are then made by a spirit duplicating machine.

_____6. This process uses a wax coated tissue which is "stencilized" by the typewriter to allow ink to pass through the stencil and leave an ink image on the paper.

_____7. In this process, the master picks up ink and puts the image on a second roller called a blanket cylinder. The blanket cylinder contacts the paper and produces the printed copy.

A. Cold-type composition

B. Fluid process

C. Layout

D. Mimeograph process

E. Office reprographics

F. Offset process

G. Paste-up

APPENDIX H

Mark whether the statement is an advantage or disadvantage and if a process is involved, indicate which process.

	Adv.	Dis-adv.	PROCESSES		
			Fluid	Mimeo-graph	Offset
Example: Equipment costs range from $500 to $1,500.		X		X	
1. Stencils have only a limited production life of up to 3,000 copies.					
2. The machine is rather simple in its mechanics and maintenance costs are low.					
3. A finished copy can be produced quickly.					
4. The process is recommended because of the high-quality appearance of finished copy.					
5. Initial cost of equipment is higher than many reproduction methods.					
6. The glossy paper needed for duplicating is less expensive than many papers intended for other forms of duplicating.					
7. The final copy is not as professional in appearance as the offset.					
8. The set-up and clean-up time can slow down production.					
9. Only 500 copies can be produced from the finest quality masters.					
10. The processes relating to preparing materials for the duplicator are not too time consuming to learn.					
11. Electronic scanners allow paste-up copy and pictures to be used.					
12. The equipment is clean and easy to operate.					
13. Carbon deposits can be easily smeared when errors are corrected.					

APPENDIX H CONTINUED

			PROCESSES		
	Adv.	Disadv.	Fluid	Mimeograph	Offset
14. Direct sunlight will fade a duplicated copy.					
15. Copies are of a good quality and legible in a variety of ink colors.					
16. Copies are relatively inexpensive.					
17. Color reproduction is a simple procedure.					
18. An operator needs specific training on operation of equipment.					
19. Duplicator is good for jobs requiring runs as high as 10,000 copies.					

APPENDIX H

ANSWER KEY

Mark whether the statement is an advantage or disadvantage and if a process is involved, indicate which process.

	Adv.	Dis-adv.	PROCESSES		
			Fluid	Mimeo-graph	Offset
Example: Equipment costs range from $500 to $1,500.		X		X	
1. Stencils have only a limited production life of up to 3,000 copies.		X		X	
2. The machine is rather simple in its mechanics and maintenance costs are low.	X				
3. A finished copy can be produced quickly.	X				X
4. The process is recommended because of the high-quality appearance of finished copy.	X				X
5. Initial cost of equipment is higher than many reproduction methods.		X			X
6. The glossy paper needed for duplicating is less expensive than many papers intended for other forms of duplicating.	X		X		
7. The final copy is not as professional in appearance as the offset.		X		X	
8. The set-up and clean-up time can slow down production.		X			X
9. Only 500 copies can be produced from the finest quality masters.		X	X		
10. The processes relating to preparing materials for the duplicator are not too time consuming to learn.	X				X
11. Electronic scanners allow paste-up copy and pictures to be used.	X			X	
12. The equipment is clean and easy to operate.	X			X	
13. Carbon deposits can be easily smeared when errors are corrected.		X	X		

APPENDIX H CONTINUED

ANSWER KEY CONTINUED

			PROCESSES		
	Adv.	Dis-adv.	Fluid	Mimeo-graph	Offset
14. Direct sunlight will fade a duplicated copy.		X	X		
15. Copies are of a good quality and legible in a variety of ink colors.	X			X	
16. Copies are relatively inexpensive.	X		X		
17. Color reproduction is a simple procedure.	X			X	
18. An operator needs specific training on operation of equipment.		X			X
19. Duplicator is good for jobs requiring runs as high as 10,000 copies.	X				X

APPENDIX I

REPROGRAPHICS ALTERNATIVES

Decide the method of duplication (fluid, carbon, stencil, offset, copier) you would recommend. If more than one type of duplicator would be suitable, indicate which one you think would be best.

_____ 1. A form to be used one week in keeping track of time spent daily on a certain job. Sixty copies will be needed.

_____ 2. The first draft of a four-page report to be sent to three executives for preliminary approval.

_____ 3. A form letter about a new product to be sent to 500 customers. Although the letters will not be personalized, the letters should look attractive. Company letterheads will be used.

_____ 4. A rough map of the route to be followed by those going to the annual office picnic.

_____ 5. An announcement to be done in green and red for distribution to 22 employees concerning hours of work over the Christmas weekend.

_____ 6. One copy of a letter received by your employer. He wants to keep the original and send a copy to the branch manager in New Orleans.

_____ 7. A sales bulletin concerning a new product for distribution to 7 branch managers and 50 sales representatives.

_____ 8. A brief informal note enclosed with a letter to Mr. Jackson asking the date of a forthcoming meeting.

_____ 9. An illustrated two-color bulletin describing a new product to be sent to 6,000 customers.

_____10. An advertising letter to be distributed to a select list of 100 customers. Either personalized copies or individually typed fill-ins for inside addresses and salutations will be used.

APPENDIX J

TAG QUIZ

This type of quiz can be used as a pretest, post-test, or both in conjunction with any unit in which the students must learn the names of supplies and pieces of parts of equipment needed to do the job.

Choose 15 to 25 articles of supplies and equipment and label each with a different number. Place each article in numerical order around the room. Each student prepares a numbered answer sheet and steps in front of one of the items.

On signal from the teacher, the students quickly write down the name of the item opposite its number on the answer sheet. The instructor should allow one to two minutes before going on to the next item. Students move to the next item and repeat the procedure.

APPENDIX K

Fluid Duplicator
Checklist

Name ______________________________

Course _____________ Date __________

Preparation

_____ Adjusts feed table
_____ Adjusts receiving tray properly
_____ Selects proper paper
_____ Fans and jogs paper
_____ Positions paper properly
_____ Sets paper counter
_____ Checks fluid supply

Machine Adjustments

_____ Attaches master properly
_____ Adjusts vertically
_____ Adjusts horizontally
_____ Adjusts impression
_____ Controls fluid supply

Job Completion

_____ Turns off motor
_____ Discards master properly
_____ Places cylinder in inactive position
_____ Inactivates fluid control
_____ Inactivates pressure control
_____ Cleans machine
_____ Covers cylinder properly
_____ Cleans work area
_____ Conserves supplies

NOTES ____

____

____

____

____

____

APPENDIX L

Stencil Duplicator Checklist

Name ________________________________

Course ____________ Date ____________

Preparation

____ Adjusts feed table properly
____ Adjusts receiving tray properly
____ Selects proper paper
____ Fans and jogs paper
____ Positions paper properly
____ Sets copy counter
____ Checks ink supply
____ Releases brake

Machine Adjustments

____ Attaches stencil properly
____ Adjusts vertically
____ Adjusts horizontally
____ Adjusts impression
____ Controls ink supply
____ Adjusts speed control

Job Completion

____ Turns off motor
____ Engages brake
____ Discards stencil properly
____ Places cylinder in inactive position
____ Cleans machine
____ Covers cylinder properly
____ Cleans work area
____ Conserves supplies

NOTES ____

____

____

____

____

____

APPENDIX M

Offset Duplicator Checklist

Name ______________________________

Course ____________ Date ____________

Preparation

____ Adjusts feed table properly
____ Positions jogger
____ Positions receiving tray properly
____ Selects proper paper
____ Fans and jogs paper
____ Positions paper properly
____ Sets copy counter
____ Checks ink supply

Machine Adjustments

____ Attaches master properly
____ Adjusts vertically
____ Adjusts horizontally
____ Adjusts impression
____ Adjusts inking
____ Adjusts speed control

Job Completion

____ Discards master properly
____ Shuts down machine properly
____ Cleans machine
____ Cleans work area
____ Conserves supplies

NOTES ____

____

____

____

____

____

APPENDIX N

REPROGRAPHICS SELF-EVALUATION

Name ______________________ Course ____________ Date ____________

My appraisal of the attached work. (Check only those that apply.)

	EXCELLENT	GOOD	FAIR
Proofreading			
Corrections			
Following directions			
Neatness			
Placement			
Stroking			
Quality of duplication			

I would be proud to submit this work to my employer. ___Yes ___No

My overall appraisal of this work: (Circle one)

EXCELLENT GOOD FAIR

* * * * * * * * * * * * * * *

Grade that the teacher thinks this work should receive: ________

Comments, if any, are on the bottom of this sheet.

SUPPLEMENTARY MATERIALS

Filmstrips w/Cassettes

Duplicating by the Spirit Method
(16 minutes)
Bailey Films
6509 LeLongpre Avenue
Hollywood, CA 90053

How to Operate a Mimeograph Duplicator
(20 minutes)
Business Education Films
5113 16th Avenue
Brooklyn, NY 11204

The Magic of Xerography
(12 minutes)
Xerox Corporation
P. O. Box 1540
Rochester, NY 14603

The Mimeograph
(35 minutes)
A. B. Dick Company
Contact Local Office

Mimeographing Techniques
(15 minutes)
Bailey Films
6509 LeLongpre Avenue
Hollywood, CA 90053

New Duplicating Techniques with Xerography
(17 minutes)
Xerox Corporation
P. O. Box 1540
Rochester, NY 14603

The Stencil
(22 minutes)
A. B. Dick Company
Contact Local Office

Practice Sets/Simulations

Alphabetic Filing Procedures
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Alphabetic Indexing
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Gregg Quick Filing Practice
Gregg/McGraw Hill
P. O. Box 996
Norcross, GA 30091

Mercury Systems, Inc.
Gregg/McGraw Hill
P. O. Box 996
Norcross, GA 30091

Office Filing Procedures
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

The Word Processing Correspondence Secretary
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Textbooks

Business Filing and Records Control
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Office Systems and Careers
Allyn and Bacon, Inc.
470 Atlantic Avenue
Boston, MA 02210

Progressive Filing
Gregg/McGraw Hill
P. O. Box 996
Norcross, GA 30091

Records Management: Controlling Business Information
Reston Publishing Co., Inc.
Reston, VA 22090

Word Processing
Prentice-Hall, Inc.
Englewood Cliffs, NJ 07632

Word Processing: A Systems Approach to the Office
Harcourt Brace Jovanovich, Inc.
Atlanta, GA 30301

Word Processing Concepts
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Transparencies

Copying and Duplicating
(Clerical Occupations - No. 7)
3M Company
Visual Products Division
1906 Beaumont Drive
Baton Rouge, LA 70806

Gregg Filing Transparencies
Gregg/McGraw Hill
P. O. Box 996
Norcross, GA 30091

Office Machines, Functions
3M Company
Visual Products Division
1906 Beaumont Drive
Baton Rouge, LA 70806

RESOURCES

Atwood, Illa W. *Teaching Office Procedures Today.* Portland: J. Weston Walch, Publisher, 1976.

Bauer, Dennis E. "Reprographics," National Business Education Association Yearbook, No. 18 (1980).

Bergerud, Marly and Jean Gonzalez. *Word/Information Processing Concepts--Careers, Technology, and Application*. New York: John Wiley & Sons, Inc., 1981.

Bergerud, Marly and Jean Gonzalez. *Word Processing Concepts and Careers*, 2d ed. New York: John Wiley & Sons, Inc., 1978.

Cantalupi, John D. "A Newsletter," *Balance Sheet*. Volume LXI, Number 7 (April, 1980).

Cecil, Paula B. *Word Processing in the Modern Office*, 2d ed. Menlo Park: The Benjamin/Cummings Publishing Company, Inc., 1980.

Enloe, Gertrude M. *Competency-Based Curriculum for Articulated Programs in Office Occupations*. Washington: U.S. Government Printing Office, 1976.

Fries, Albert C., et al. *Applied Secretarial Procedures*, Seventh Edition. New York: McGraw-Hill Book Company, 1974.

Nelson, Frank E. "Clerical Office Procedures," *Business Education Forum*. March, 1974.

Oelrich, Elizabeth S. "Understanding Reprographics," *Today's Secretary*. October, 1980.

Oliverio, Mary Ellen and William R. Pasewark. *Secretarial Office Procedures*. Cincinnati: South-Western Publishing Company, 1977.

Pasewark, William R. *Duplicating Machine Processes*, 2d ed. Cincinnati: South-Western Publishing Company, 1975.

Rosen, Arnold and Rosemary Fielden. *Word Processing*. Englewood Cliffs: Prentice-Hall, Incorporated, 1977.

Scharle, Judith A. "Six Myths About Filing," *Business Education World*. Volume 61, Number 1 (September-October, 1980).

Stewart, Jeffrey R., Jr., et al. *Office Procedures*. New York: McGraw-Hill Book Company, 1980.

Stewart, Jeffrey R., Jr. and Judith A. Scharle. *Office Reprographics*. New York: McGraw-Hill Book Company, 1979.

UNIT IV

HUMAN RELATIONS

INTRODUCTION

Rosemary T. Fruehling* states that human relations is what everyday life is all about. In the everyday world, you relate to people at all times; you depend on people, and other people depend on you. This unit was undertaken to provide the student with tools to develop human relation skills.

Students will be given the opportunity to develop good human relation skills through individual and group activities, checklists, and class discussion.

COMPETENCIES

1. Exhibit an awareness of oneself and others.
2. Apply time management, leadership, and communication skills necessary for effective human relations.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Demonstrate an understanding of yourself.
2. Demonstrate ability to relate to others.
3. Apply effective techniques for a successful working relationship with supervisor.
4. Recognize the importance of communication to good human relations.
5. Recognize different styles of leadership.
6. Apply principles of time management.

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* Fruehling, Rosemary T., Working At Human Relations, (New York: Gregg Division, McGraw-Hill Book Company, 1977), p. 2.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. On a written test, students will be able to define terms related to human relations with at least 75 percent accuracy.
2. Given a list of character traits, students will be able to define them on a written test with at least 75 percent accuracy.
3. Given the necessary background information, students will be able to list on a test at least four basic human needs.
4. Given a list of good health and grooming practices, students will be able to rate their own health and grooming practices and explain the reasons for these ratings in class.
5. At the end of the unit, students will be able to evaluate themselves with a checklist on their ability to cooperate with others and to display an awareness of the needs of others. Seventy-five percent of the items on the checklist must receive an average rating.
6. After a class discussion, student groups will be able to write scripts showing at least two communication problems and how these problems affect human relations.
7. On a written test, students will be able to state at least two causes of stress.
8. At the end of a class discussion, students will be able to list three prejudices that hinder good human relations.
9. On a written test, students will be able to list at least five types of discrimination.
10. During class, students will be able to distinguish between a list of discriminatory and non-discriminatory behaviors with at least 75 percent accuracy.
11. Given a list of managerial behaviors on a written test, students will be able to match the behavior with the leadership style displayed with at least 75 percent accuracy.
12. On a written test, students will be able to place job tasks in order of priority with at least 75 percent accuracy.
13. In a class discussion, students will be able to give acceptable ways to handle crises and pressure situations.

SUGGESTED INTEREST APPROACHES

1. Give a pretest to determine the students' knowledge of "human relations."
2. Have a business manager speak on the importance of getting along with others.
3. Provide students with checklists and assignment sheets on health and grooming practices, getting along with others, discrimination, and leadership skills.

METHODOLOGY

This unit has been planned to include activities to improve human relation skills. Teacher lecture will be used to present content material obtained from resources available. For effective presentation of this material, the student must be involved individually or in groups.

UNIT OUTLINE

HUMAN RELATIONS

I. Personal Skills

   A. Internal
      1. Character traits
      2. Human needs
   B. External
      1. General health
      2. Grooming and cleanliness

II. Job-Keeping Skills

   A. People
      1. Peers
      2. Employers
      3. Customers
   B. Communications
      1. Oral
      2. Written
      3. Body language

III. Coping Skills

    A. Stress
    B. Discrimination
        1. Discrimination problems
        2. Sexual harassment
        3. Legal aspects

IV. Leadership Skills

    A. Styles
        1. Authoritarian
        2. Democratic
        3. Laissez-faire
    B. Comparisons
        1. Advantages
        2. Disadvantages

V. Time-Management Principles

    A. Efficient use of time
    B. Crises
    C. Pressure situations

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

---

1. On a written test, students will be able to define terms related to human relations with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Human relations	1. Form groups and use a dictionary to define the following human relations terms: a. human relations b. communications c. cooperation d. needs e. self-image Present group definitions to class and come up with one definition for the class. 2. Divide into groups and compose a human relations problem.

Human relations	3. Solve a human relations problem prepared by another group (work in groups). Present solution to class. 4. Write an essay on the importance of human relations in work situations. Present in class.

---

2. Given a list of character traits, students will be able to define them on a written test with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Positive character traits	1. Prepare a bulletin board depicting positive character traits. 2. Write sentences with the following character traits: a. tact b. loyalty c. compatability d. poise e. congeniality f. cooperativeness g. dependability Exchange papers and in small groups check the sentences. 3. Write a short paragraph explaining why an employee may be dismissed because of poor character traits. Discuss paragraphs in class. 4. Interview a personnel manager to determine the character traits most desired in an employee. Compile a class list and post on bulletin board.

3. Given the necessary background information, students will be able to list on a test at least four basic human needs.

Subject Matter Content	Learning Activities
Basic human needs	1. Discuss the basic human needs and construct a definition and example of each. Work in small groups. 2. Complete the Scrambled Words Exercise on basic human needs. (Appendix A) 3. Pick a need from slips of paper in a hat and write a brief paragraph showing how you would be affected by the deprivation of one of the basic human needs. Discuss in class.

4. Given a list of good health and grooming practices, students will be able to rate their own health and grooming practices and explain the reasons for these ratings in class.

Subject Matter Content	Learning Activities
Health and grooming practices	1. Evaluate yourself on health and grooming practices. Checklist provided. Identify weaknesses and present a plan for improvement. (Appendix B) 2. List ways poor health may impair your efficiency on the job. Work in groups. Present to class for discussion. 3. Prepare a booklet depicting acceptable work attire. Display in class.

5. At the end of the unit, students will be able to evaluate themselves with a checklist on their ability to cooperate with others and to display an awareness of the needs of others. Seventy-five percent of the items on the checklist must receive an average rating.

Subject Matter Content	Learning Activities
People	1. Divide into groups and demonstrate a situation showing good human relations and another showing poor human relations for each of the following relationships: a. employee--employee b. employer--employee c. customer--employee 2. Suggest ways to get along with others--co-workers, employers, customers. Work in small groups. Present to class for discussion. 3. Evaluate yourself on a checklist for getting along with others. Share with another to see if they agree. (Appendix C)

6. After a class discussion, student groups will be able to write scripts showing at least two communication problems and how these problems affect human relations.

Subject Matter Content	Learning Activities
Communications	1. Identify barriers to communication that contribute to poor human relations. Work in small groups. Discuss these as a class. 2. Write a short report describing situations when poor human relations resulted from ineffective communications. In groups, change the situation to improve human relations and present to the class.

Communications	3. Analyze conversations for good or poor human relations. In class, cite any communication problems observed. 4. Obtain copies of letters and/or memos from local businesses and analyze them for clarity of message. 5. Play charades to show how body language can be used in communications. 6. Write a script in groups, depicting at least two communications problems. Act out the script before the class.

---

7. On a written test, students will be able to state at least two causes of stress.

Subject Matter Content	Learning Activities
Stress	1. List factors which contribute to job stress. Compile into one list as a class. 2. Identify the causes of stress in case studies distributed by the teacher to small groups. Share your results with the class. 3. Select at least one appropriate remedy for each cause of stress identified in case studies. Discuss these as a class.

---

8. At the end of a class discussion, students will be able to list three prejudices that hinder good human relations.

Subject Matter Content	Learning Activities
Discrimination	1. State your definition of prejudice and compile a class definition.

Discrimination	2. Cite examples of discrimination that you might have encountered on the job. Present for class discussion. 3. Describe how prejudices can hinder human relations. Work in small groups. Report to the class.

---

9. On a written test, students will be able to list at least five types of discrimination.

Subject Matter Content	Learning Activities
Discrimination--legal aspects	1. Write a report on recent laws affecting job discrimination. Present to the class. 2. Read information concerning the Civil Rights Act of 1964. Report to the class the types of discrimination most affected by this act. 3. Discuss areas where you may be subject to discrimination and report to the class. Work in small groups. 4. List at least two ways to overcome discrimination in the situations from Activity 3 and present to the class.

---

10. During class, students will be able to distinguish between a list of discriminatory and non-discriminatory behaviors with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Discrimination problems	1. Complete a worksheet showing examples of discriminatory and non-discriminatory behaviors. (Appendix D)

Discrimination problems	2. Research newspaper articles, periodicals, and books for discrimination cases and report the results to the class. 3. Indicate means of dealing with discrimination in a positive manner in a group discussion.

---

11. Given a list of managerial behaviors on a written test, students will be able to match the behavior with the leadership style displayed with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Leadership skills	1. Identify the three main styles of leadership (management). Discuss the characteristics of each. Work in small groups. 2. Compare the advantages and disadvantages of each leadership style. 3. Role play a sample business situation in groups with a designated leader. Checklists will be used by group members to rate the leader. (Appendix E) The leader must receive an overall average rating. Group members will identify the management style displayed.

---

12. On a written test, students will be able to place job tasks in order of priority with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Efficient use of time	1. Develop a schedule for completing job tasks in the most efficient manner.

Efficient use of time	2. Keep a record of time spent on various activities for a week and list ways to make better use of time.
	3. Analyze your job and list tasks according to rush, important, and routine. Present your list to the class.

---

13. In a class discussion, students will be able to give acceptable ways to handle crises and pressure situations.

Subject Matter Content	Learning Activities
Crises and pressure situations	1. List ways to organize yourself in order to avoid crises. Discuss in class.
	2. Talk with office workers to find out how they handle pressure situations. Report the results to class.
	3. Obtain suggestions from other workers on saving time and energy in completing office tasks. Share the suggestions with the class.

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

* Unit test
* Individual and group projects
* Class participation grade
* Checklists

EQUIPMENT AND SUPPLIES

Student

Textbook
Notebook
Checklists
Worksheets
Case Studies
Reference Books
Pen/Pencil

Teacher

Textbook and Manual
Bulletin Board Supplies
Checklists
Worksheets

APPENDIX A

SCRAMBLED WORDS

Listed below are several scrambled words having to do with human needs. See how many words you can unscramble. Write in the blank provided.

vlsrvuia ______________________________

usyeirtc ______________________________

taecccpane ______________________________

tecsrpe ______________________________

ttleopani ______________________________

lhreest ______________________________

mnaoiidart ______________________________

fsle-treiaolniza ______________________________

tdmnnuegrsdia ______________________________

Answers: survival, security, acceptance, respect, potential, shelter, admiration, self-realization, understanding

APPENDIX B

HEALTH AND GROOMING CHECKLIST

Place a check in the column which best describes your health and grooming habits. If you check "part of the time" or "never," write a plan for improvement.

Do you . . .	Most of the time	Part of the time	Never
1. Eat well-balanced meals?			
2. Get the required amount of sleep?			
3. Get enough physical exercise?			
4. Have an annual physical check-up?			
5. Go to the dentist on a regular basis?			
6. Bathe or shower daily?			
7. Brush your teeth at least twice a day?			
8. Wash your hair on a regular basis?			
9. Use deodorant daily?			
10. Have a blemish-free complexion?			
11. Have your hair cut neatly or becomingly styled?			
12. Have fresh breath?			
13. Manicure your nails regularly?			
14. Dress appropriately for work?			

APPENDIX B CONTINUED

Do you . . .	Most of the time	Part of the time	Never
15. Choose comfortable clothing?			
16. Check your overall appearance?			
17. Choose becoming clothes?			
18. Keep your clothes clean and mended?			
19. Wear well-fitting shoes?			
20. Practice correct posture?			

APPENDIX C

GETTING ALONG WITH OTHERS

In an office, people must know how to get along with others. As a self-test, rate yourself by checking the appropriate column. Write a plan for improvement. (5 is the highest)

	Rating				
	5	4	3	2	1
1. Cooperative					
2. Tactful					
3. Good natured					
4. Friendly					
5. Courteous					
6. Punctual					
7. Considerate					
8. Initiative					
9. Loyal					
10. Organized					
11. Efficient					

APPENDIX C

ANALYSIS

31 to 55 points: You should be able to get along with others.

15 to 30 points: You will probably get along with most people. Try working toward more "5" ratings.

0 to 14 points: You will have trouble getting along with others. You must attempt to display positive characteristics.

APPENDIX D

RECOGNIZING DISCRIMINATION

Analyze the following situations and decide whether each is discriminatory or non-discriminatory. If the situation is discriminatory, identify the type of discrimination and give reasons why you feel the situation is discriminatory. Write your answers on a separate sheet of paper.

1. The boss decides to hire a female for the job because her salary expectations are probably lower than a male's.
2. An employee who has been with the company for 30 years is passed over for a promotion because it is felt that he/she is too old to learn a new job.
3. A woman with qualifications equal to a prospective male employee is not hired because the boss feels she may take more time off due to her responsibilities as a mother.
4. Two teenagers are hired for summer work. The black teen is assigned to the maintenance department. The white student will be working in the manager's office.
5. The company has a policy of not hiring anyone under age 18. This was brought about by bad experiences with part-time student help.
6. Only Catholics are hired as teachers or staff members in Catholic schools.
7. Male employees are required to wear a coat and tie. There is no specified dress code for females.
8. A company keeps three inefficient workers but fires a handicapped worker whose job record is not worse than the other three.
9. A new employee spoke with an Italian accent. The supervisor was extra careful to use small words and speak distinctly when giving instructions to this new employee.
10. Three members of the typing pool were up for the job of receptionist--two females and one male. The executives decided to promote either one of the "girls" without looking at their qualifications. They felt a girl would "brighten up" the front office.

APPENDIX E

CHECKLIST OF LEADERSHIP SKILLS

Use the following checklist to rate your group leader on quality of leadership skills displayed.

	never 1	seldom 2	sometimes 3	often 4	always 5
Ability to delegate					
Accepts suggestions					
Challenging					
Fair					
Gives encouragement					
Motivates					
Organized					
Praises					
Self-confident					
Sincerely interested in others					
Tactful					
Thinks independently					
Enthusiastic					
Knowledgeable					

Leadership style displayed: ______________________________

Overall rating of leader: ______________________________

SUPPLEMENTARY MATERIALS

Activity Packs

Activities for Exploring Values

01-7447-B5 (50 photocopy masters)
03-7447-B5 (50 spirit masters)
J. Weston Walch, Publisher
Box 658
Portland, ME 04104-0658

Listening Skills

09-1916-B5 (12 spirit masters)
J. Weston Walch, Publisher
Box 658
Portland, ME 04104-0658

Office Practice Activities

03-24180B5 (50 spirit masters)
J. Weston Walch, Publisher
Box 658
Portland, ME 04104-0658

Teacher Aids for Office Practice Classes

03-2420-B5 (50 spirit masters)
J. Weston Walch, Publisher
Box 658
Portland, ME 04104-0658

Cassettes

The Business of Oral Communication

E956 (20 Audio Cassettes, Modules 1, 2, and 3)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Case-Study Cassette Library: Career Core Competencies

87780-7 (21 audio cassettes)
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Gregg Secretarial Training Recordings, Set 1

87775-0 (6 cassettes)
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

269

Cassettes continued

On the Job

K4KK 0902 (20 cassettes, 24 student record books)
Educational Audio Visual, Inc.
Pleasantville, NY 10570

Filmstrips with Cassettes

Becoming an Adult: A Disney Family Studies Series

63-8085CA (5 filmstrips, 5 cassettes, 5 spirit masters)
Walt Disney Educational Media Company
500 South Buena Vista Street
Burbank, CA 91521

Job Attitudes and Habits

K1KF 4405 (5 filmstrips, 5 cassettes)
Educational Audio Visual, Inc.
Pleasantville, NY 10570

Textbooks

Dramatizations for Business Classes

01-2006-B5
J. Weston Walch, Publisher
Box 658
Portland, ME 04104-0658

Human Relations in Business

G18
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Modern Ms.

Second edition
69663-2 (text-workbook)
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Office Etiquette

01-2036-B5
J. Weston Walch, Publisher
Box 658
Portland, ME 04104-0658

Textbooks continued

Personal Psychology for Life and Work
03592-X (text-workbook)
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Transparencies

Personal Development Transparency Series
K401 (80 transparencies)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Transparencies for the Basic and Social Skills, Vol. 1: Communications in Marketing
86471-3
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Transparencies for the Basic and Social Skills, Vol. 3: Psychology and Human Relations in Marketing
86473-X
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

RESOURCES

Eggland, Steven A. and John W. Williams. Human Relations at Work. 2nd ed. Cincinnati: South-Western Publishing Company, 1981.

Fruehling, Rosemary T. and Edwin L. Herr. Working at Human Relations. New York: McGraw-Hill Book Company, 1977.

George, Claude S., Jr. Supervision in Action: The Art of Managing Others. Reston Publishing Company, Inc., 1979.

Group Instruction for Cooperative Programs. State Department of Vocational and Technical Education, Stillwater, Oklahoma, 1978.

Hanna, J. Marshall, et al. Secretarial Procedures and Administration. Cincinnati: South-Western Publishing Company, 1978.

Hiserodt, Donald D. Psychology and Human Relations in Marketing. New York: McGraw-Hill Book Company, 1969.

Meehan, James R., et al. Secretarial Office Procedures. Cincinnati: South-Western Publishing Company, 1972.

Russon, Allien R. and Harold R. Wallace. Personality Development for Work. Cincinnati: South-Western Publishing Company, 1981.

Steinmetz, Lawrence L. Human Relations: People and Work. New York: Harper & Row, Publishers, 1979.

Stewart, Jeffrey R., Jr., et al. Office Procedures. New York: McGraw-Hill Book Company, 1980.

Williams, J. Clifton. Human Behavior in Organizations. Cincinnati: South-Western Publishing Company, 1978.

Williams, John W. and Steven A. Eggland. Communicating at Work. Cincinnati: South-Western Publishing Company, 1979.

UNIT V

SECURING AND KEEPING A JOB

INTRODUCTION

In the competitive job market, it is necessary that a prospective employee develop skills needed for employment now and in the future. This unit allows students the opportunity to develop those skills.

COMPETENCIES

1. Prepare for career opportunities.
2. Develop good grooming habits.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Research available job opportunities.
2. Prepare for employment.
3. Exhibit desirable dress and grooming characteristics.
4. Perform follow-up procedures.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. In a classroom discussion, students will be able to identify the sources for employment with at least 75 percent accuracy.
2. Given the necessary information, students will be able to compose and type in class a letter of application and a personal data sheet with 100 percent accuracy.
3. On a written test, students will be able to complete the necessary employment forms with 100 percent accuracy.
4. Given several illustrations, students will be able to select those appropriately dressed for the office with 100 percent accuracy.

5. In a classroom discussion, students will be able to identify effective interview techniques with at least 75 percent accuracy.

6. In a classroom discussion, students will be able to explain proper job follow-up procedures with at least 75 percent accuracy.

SUGGESTED INTEREST APPROACHES

1. Bring classified ads from the local newspaper for discussion of job qualifications and opportunities for employment.

2. Prepare a bulletin board displaying appropriate dress and grooming techniques.

3. Invite a local personnel director to discuss techniques for securing and keeping a job.

METHODOLOGY

This unit has been designed to introduce students to those skills necessary for securing and keeping a job. Teacher lecture and classroom discussion will be used to present the unit content. Students will complete forms necessary for employment.

UNIT OUTLINE

SECURING AND KEEPING A JOB

I. Research of Job Market

    A. Job Opportunities
        1. Employment agencies
        2. Classified ads
        3. Direct inquiry
        4. Miscellaneous
    B. Job Qualifications

II. Letter of Application/Data Sheet

    A. Styles
    B. Content

III. Employment Forms

    A. Application
    B. W-4

IV. Personal Appearance and Grooming

   A. Appropriate clothing
   B. Business standards of grooming

V. Interview

   A. Procedures
   B. Materials needed

VI. Follow Up

   A. Evaluation of job offer
   B. Telephone call/letter

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

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1. In a classroom discussion, students will be able to identify the sources for employment with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Job research	1. Contact a local employment agency and report to the class the procedures involved in obtaining a job through that agency. 2. List the skills you possess which will help you qualify for an office position. 3. Compile a list from the classified ads of those job opportunities for which you are now qualified and those which require additional training using the information from Activity 2. 4. Contact the school placement office/counselor for available job opportunities and compile a list for classroom discussion. 5. After class discussion, list the sources available for obtaining a job.

Job research	6. Research and prepare a report to be presented orally on an occupation that best fits your interests, abilities, skills, values, lifestyle, and other personal goals. (Appendix A)

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2. Given the necessary information, students will be able to compose and type in class a letter of application and a personal data sheet with 100 percent accuracy.

Subject Matter Content	Learning Activities
Letter of application and data sheet	1. Examine various styles used in constructing a personal data sheet. 2. Compile a list of the information that should be included on a personal data sheet. 3. Prepare a personal data sheet. 4. List the basic outline for an application letter. 5. Apply for a position by composing and typing a letter of application using the information from Activity 4. 6. Have peers evaluate Activities 3 and 5.

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3. On a written test, students will be able to complete the necessary employment forms with 100 percent accuracy.

Subject Matter Content	Learning Activities
Employment forms	1. Examine sample application forms and discuss in class the information requested. 2. Complete a Form W-4.

Employment forms	3. Complete an application form. 4. Research what can and cannot be legally asked on an application form and report to the class.

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4. Given several illustrations, students will be able to select those appropriately dressed for the office with 100 percent accuracy.

Subject Matter Content	Learning Activities
Appropriate dress/grooming	1. Dress in appropriate office attire on a particular day and evaluate each other using checklist provided. (Appendix B) 2. Select five examples of appropriate office attire from current magazines. Label and display on a bulletin board for class discussion. 3. View a filmstrip on personal grooming and take notes on grooming habits on which you need to improve. 4. Read a book on "grooming" and report to the class.

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5. In a classroom discussion, students will be able to identify effective interview techniques with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Job interview	1. View a filmstrip on the job interview and discuss in class. 2. List ten "Dos" and "Don'ts" for a job interview. 3. Discuss in small groups the questions frequently asked during an interview. (Appendix C)

Job interview	4. Role play a situation where you make a job interview appointment by phone. Class will evaluate using checklist provided. (Appendix D) 5. Research what can and cannot be legally asked by an interviewer and discuss in class. Include discussion on how the interviewer should react to questions that are illegal to ask.

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6. In a classroom discussion, students will be able to explain proper job follow-up procedures with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Follow-up	1. After classroom discussion, list ten items to consider when evaluating a job offer. 2. After viewing examples supplied by teacher, list points to be included in a follow-up letter. 3. After demonstration, list the information needed for making a follow-up telephone call. 4. Role play effective and ineffective follow-up phone calls.

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

- Subject area tests
- Rating sheets
- Checklists
- Class participation grade
- Unit test
- Individual research

EQUIPMENT AND SUPPLIES

Student

- Textbook
- Notebook
- Practice Sets
- Checklists
- Pencil/Pen
- Instruction Sheets
- Typing Paper
- Case Study Problems
- Typewriter
- Correction Materials

Teacher

- Textbook and Manual
- Filmstrips
- Filmstrip Projector
- Overhead Projector
- Transparencies
- Transparency Pen
- Checklists
- Rating Sheets
- Bulletin Board Supplies
- Projector Screen
- Teacher-made Tests
- Cassette Player
- Cassette Tapes

APPENDIX A

OCCUPATIONAL RESEARCH

Select an occupation from the Dictionary of Occupational Titles or the Occupational Outlook Handbook that best fits your interests, abilities, skills, values, life-styles, and other personal goals. You may use one or more ways to research the occupation.

- Use written resources
- Interview employees in the field using the survey included
- Write companies in that field for information

Prepare a written report to be presented orally on the occupation selected.

SUGGESTED QUESTIONS FOR INTERVIEWING EMPLOYEES IN THE FIELD:

What are your duties?
What are your working hours?
How often are you required to work overtime?
How are your duties different from day to day?
What type of special clothing or shoes are required for work?
How do you depend on other people to help you or your work?
How do others depend on your work?
What kinds of talents, interests, or abilities would be helpful to a person for succeeding in your field?
What are the physical demands of your work?
What personal qualities are important for your work?
What are the salary ranges, saving programs, or profit-sharing programs?
What are the fringe benefits--vacation time, sick leave, insurance, and educational leave?
What is the approximate starting salary in this type of work?
In what other areas can a person use the knowledge and skills learned in this occupation?
What are the legal regulations?
What are the physical qualifications?
What decisions are you responsible for on your job?
What other information about your job would you like to tell me?

APPENDIX B

CHECKLIST FOR APPROPRIATE OFFICE ATTIRE

Women

____ Coordinated outfit, freshly cleaned and pressed
____ Clean shoes in good repair that match apparel
____ Hosiery that blend with skin tone, free from runs and snags
____ Simple purse that coordinates with clothing
____ Clean and neatly styled hair
____ Clean and well-shaped nails (pleasing nail polish, if desired)
____ Neatly applied makeup, conservative and well blended
____ General cleanliness

Men

____ Coordinated outfit, freshly cleaned and pressed
____ Clean shoes in good repair that match apparel
____ Appropriate tie
____ Socks coordinated with trousers
____ Fresh shave
____ Clean, well-kept hair
____ Clean and well-shaped nails
____ General cleanliness

APPENDIX C

QUESTIONS AN EMPLOYER MIGHT ASK

1. What kind of job do you want?
2. Why do you want this job? Why have you selected this kind of work?
3. If you had your choice of job and company, what would you most like to be doing and where?
4. What experience have you had?
5. What can you do?
6. How much education have you had?
7. What special training have you had?
8. What kind of student were you in high school?
9. In what extracurricular activities did you participate in school?
10. What do you do with your spare time? What are your hobbies?
11. How well do you get along with others?
12. How well do you follow instructions?
13. How well do you take constructive criticism?
14. What salary do you expect? When would you expect your first raise?
15. What are your objections to working overtime or shift work, if operations are conducted around the clock?
16. How do you feel about travel?
17. What are your objections to being transferred to another location, if necessary?
18. Would you watch the clock or would you concentrate on your work?
19. What kind of person was your former employer?
20. What type of reference will your former employer or teacher give you?
21. Would you talk about your employer or the company at home?
22. How do you feel about helping others with their work after you have finished your work?
23. What effort would you make to get along with other employees?

APPENDIX D

CHECKLIST FOR USING THE TELEPHONE TO ARRANGE A JOB INTERVIEW

	Yes	No
1. Was prepared before calling.		
2. Identified self immediately.		
3. Did not hesitate to find the right words.		
4. Gave reasons for calling immediately.		
5. Asked for the best time for an appointment with the interviewer.		
6. Asked about getting application form.		
7. Was courteous and friendly.		
8. Thanked the secretary.		
9. Noted the interview date, time, and place.		

SUPPLEMENTARY MATERIALS

Films

Applying for a Job
Encyclopedia Britannica Educational Corp.
425 North Michigan Avenue
Chicago, IL 60611

Getting a Job Is a Job
Dibie-Dash Productions
4949 Hollywood Boulevard
Suite 217
Hollywood, CA 90028

I Guess I Got the Job
McGraw-Hill Films
1221 Avenue of the Americas
New York, NY 10020

Your Job: Applying for It
Coronet Films
Coronet Building
63 East South Water Street
Chicago, IL 60601

Your Job: Finding the Right One
Coronet Films
Coronet Building
63 East South Water Street
Chicago, IL 60601

Filmstrips with Cassettes

Entering the World of Work Series
McKnight Publishing Company
Bloomington, IN 47405

First Job Multimedia Program
EG340
Cole Supply Company
P. O. Box 1717
Pasadena, TX 77501

Human Relations for Success In Business
Catalog No. 13-5
Educational Publishers
3839 White Plains Road
Bronx, NY 10467

Office Education Series I & II
International Film Bureau, Inc.
332 South Michigan Avenue
Chicago, IL 60604

Office Worker Series
Catalog No. IE 119
Career Aids Inc.
8950 Lurline Avenue
Dept. K45
Chatsworth, CA 91311

Personal Hygiene for Business
Milady Publishing Company
3839 White Plains Road
Bronx, NY 10467

Winning the Job
XC214
Cole Supply Company
P. O. Box 1717
Pasadena, TX 77501

Writing Friendly Letters, Business Letters, and Resumes
CV374CAF
Career Aids, Inc.
8950 Lurline Avenue
Dept. K45
Chartsworth, CA 91311

Pamphlets

Appointment with Tomorrow
Vaseco, Inc.
2301 Classen Boulevard
P. O. Box 60274
Oklahoma City, OK 73106

How Not to Blow a Job Interview
Available free from the Army Reserve recruiter

How to Get and Hold the Right Job
Available from your local state employment service office

How to Prepare Yourself for Job Interviews
Available from your local state employment service office

How to "Sell Yourself" to an Employer
Available from your local state employment service office

Textbooks

Clerical Office Procedures
Catalog No. K38
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Getting a Job--Process Kit
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

How to Find and Apply for a Job
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

The Job You Want--How to Get It
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

RESOURCES

Hanna, J. Marshall, et al. Secretarial Procedures and Administration. Dallas: South-Western Publishing Company, 1978.

Lee, LaJuana Williams, et al. Business Communications. Chicago: Rand McNally College Publishing Company, 1980.

Nelson, Frank W. Group Instruction for Cooperative Programs. Stillwater: State Department of Vocational and Technical Education, 1978.

Stewart, Marie M., et al. College English and Communication. New York: McGraw-Hill Book Company, 1975.

UNIT VI

COMMUNICATION SKILLS

INTRODUCTION

Communication is involved in all activities with others. Those who are the most successful in the business world have acquired the techniques of receiving messages attentively and sending messages that promote favorable responses.

This unit attempts to aid students in realizing that every communication is a sales project--to sell an idea, a product, or a point of view. When they accept this philosophy, they will automatically strive for perfection in communicating.

COMPETENCIES

1. Send and receive messages successfully.
2. Use oral and written communications effectively.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Recognize the importance of effective communications.
2. Develop ability to send and receive messages.
3. Demonstrate the correct use of basic English language skills.
4. Handle incoming and outgoing correspondence effectively.
5. Prepare business documents.
6. Employ successful reading, writing, speaking, and listening skills.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. After a lecture on "The Importance of Effective Communications in Business," students will be able to list on a test five reasons why communicating is important today.

2. Given a list of situations, students will be able to indicate in written statements how to say "no" courteously and retain the friendship of the inquirer, with an average rating of not less than three when evaluated on a scale of one to five (one being the highest).

3. Given a list of sentences in class, students will identify the underlined parts of speech with at least 75 percent accuracy.

4. Given a list of incorrect sentences on a test, students will rewrite them correctly with at least 75 percent accuracy using good sentence structure, proper words, proper punctuation, and proper capitalization.

5. After class discussion, students will be able to list on a written test seven of ten qualities of effective business letters.

6. On a written test, students will be able to define seven of ten qualities for effective business letters.

7. On a production test, students will be able to produce within 120 minutes three of the following business letters. Evaluation will be based on the qualities for effective business letters.
    a. Thank you letter
    b. Request for information
    c. Letter of recommendation
    d. Letter of acknowledgment
    e. Letter of congratulations

8. Given examples in class, students will be able to prepare the following business documents: interoffice memorandums, minutes, financial records, and manuscripts with at least 75 percent accuracy.

9. Given a list of business-related topics, students will be able to present a three-to-five minute oral report in class. Evaluation will be based on a checklist containing good oral reporting techniques.

10. Given a newspaper article to read in a group situation, students will be able to answer orally questions related to the article with at least 75 percent accuracy.

SUGGESTED INTEREST APPROACHES

1. Invite a local newspaper reporter or anchorperson to speak on the importance of effective communications.
2. Make bulletin board displays focusing on the art of communication.
3. Have students check local newspaper printouts for grammatical errors.
4. Tape students as they present talks, speeches, and reports in two classroom situations (announced and unannounced) so that they may hear their oral communication skills.

METHODOLOGY

This unit on communication has been developed to familiarize students with the methods and techniques of effective business communication. Modes of presentation will be teacher lecture, newspaper activities, guest speakers from communications media, taped discussions, letter writing, and oral reports.

UNIT OUTLINE

COMMUNICATION SKILLS

I. Recognizing the Importance of Effective Communications
    A. Characteristics and standards of business communication
    B. Communication skills for everyday living

II. Sending and Receiving Messages
    A. Roles of senders and receivers
    B. Importance of and need for empathy

III. Using Correct Language Skills
    A. Variety in business word usage
    B. Qualities of good business writing

IV. Handling Correspondence Effectively
    A. Effective business letters
    B. Incoming and outgoing correspondence

V. Preparing Other Business Documents

   A. Clarity and conciseness in business communications
   B. Purposes of preparing business reports

VI. Employing successful reading, writing, speaking, listening skills

   A. Speaking skills
   B. Listening skills
   C. Reading skills

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

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1. After a lecture on "The Importance of Effective Communications in Business," students will be able to list on a test five reasons why communicating is important today.

Subject Matter Content	Learning Activities
Effective communications	1. Write a paragraph on "The Importance of Effective Communications" and present to class for discussion. 2. Play an advertising slogan game and discuss the effectiveness of this type of communication. (Appendix A) 3. Play a class rumor game and discuss the possible effects of this kind of communication. (Appendix B) 4. View a filmstrip on communications and break into groups to list the main ideas of the film, putting them in order of importance. A single list can then be compiled on the chalkboard. 5. Interview a local secretary to ascertain the importance of handling incoming and outgoing correspondence effectively. Give an oral report to the class.

2. Given a list of situations, students will be able to indicate in written statements how to say "no" courteously and to retain the friendship of the inquirer, with an average rating of not less than three when evaluated on a scale of one to five (one being the highest).

Subject Matter Content	Learning Activities
Roles of senders and receivers	1. Relate examples of actual situations in which you had to say "no" and still tried to keep the friendship of the other person. 2. Divide into pairs and role play situations in which the answer would be "no." (Appendix C) 3. Give a negative response to a letter of inquiry while retaining goodwill of the inquirer and discuss with classmates. 4. View a film on self-expression, write a report of the important points, and present to the class for discussion.

3. Given a list of sentences in class, students will identify the underlined parts of speech with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Language skills	1. Write sentences illustrating the different parts of speech and give reasons for your choices to the class. 2. View a film on the parts of speech and discuss with classmates. 3. Prepare a bulletin board identifying the parts of speech. 4. Have students identify parts of speech of chosen words from magazine articles in a small group setting and present to class with explanation.

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4. Given a list of incorrect sentences on a test, students will rewrite them correctly with at least 75 percent accuracy using good sentence structure, proper words, proper punctuation, and proper capitalization.

Subject Matter Content	Learning Activities
Basic language skills	1. Write a paragraph and have a peer try to find errors to reinforce the principles of basic word usage. Discuss findings in class.
	2. Secure newspaper and magazine clippings in which grammatical errors are present. These are to be compiled in a scrapbook and corrections indicated. Present to the class for discussion.
	3. Play the money game for students to realize their strengths and weaknesses in applying basic language skills. (Appendix D)

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5. After class discussion, students will be able to list on a written test seven out of ten qualities of effective business letters.

Subject Matter Content	Learning Activities
Qualities of business letters	1. List and identify the ten qualities of effective business letters. Check for correctness. (Appendix E)
	2. Play grab bag game by having each quality of good business letter written on slips of paper in container. Each student picks one and defines quality to remain in game. Last one left in each group is a winner.

Qualities of business letters	3. Bring in letters received in the mail and analyze with the class according to list of qualities of good business letters. 4. Play charades using blackboard to depict a quality of a good business letter while the other members guess.

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6. On a written test, students will be able to define seven out of ten qualities for effective business letters.

Subject Matter Content	Learning Activities
Qualities of business letters	1. Grade letters brought from home according to the ten qualities. Each student will pick one to explain to peers the qualities present. 2. Write a letter ordering an article using the ten qualities. Bring a copy of letter to class for presentation so that other students may rate letter using the ten qualities for composing effective letters. Students are to be able to defend their remarks. 3. Prepare bulletin board illustrating the qualities of effective business letters.

7. On a production test, students will be able to produce within 120 minutes three of the following business letters. Evaluation will be based on the qualities for effective business letters.
    a. Thank you letter
    b. Request for information
    c. Letter of recommendation
    d. Letter of acknowledgment
    e. Letter of congratulations

Subject Matter Content	Learning Activities
Effective letter writing	1. Form groups and discuss the various styles for writing business letters. Select the preferred style. Be able to support selection in class. 2. Make a list of letters which might be written by persons in different careers. Compile list with peers. 3. Compose letters covering various business situations for practice. Have a peer critique them. 4. Obtain samples of as many of the types of letters as possible to present to the class.

8. Given examples in class, students will be able to prepare the following business documents: interoffice memorandums, minutes, financial records, and manuscripts with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Preparation of documents	1. Write a brief memorandum announcing a meeting of the business club. Put on overhead and have peers critique. 2. Draw up a sample memorandum form which might be used in an office. Discuss it with a peer.

Preparation of documents	3. Write a short formal report which includes the necessary parts and present to class. 4. Prepare a full-rate telegram to reserve a room for an upcoming convention. Put on overhead for discussion by peers. 5. Write a news release concerning a play to be presented by the business club. Discuss with a peer. 6. Prepare minutes of a meeting and present it to the class.

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9. Given a list of business-related topics, students will be able to present a three-to-five minute oral report in class. Evaluation will be based on a checklist containing good oral reporting techniques.

Subject Matter Content	Learning Activities
Preparation/presentation of documents	1. Prepare a one-minute business-related talk and present it to the class. Peers will critique. 2. Write and present a three-to-five minute formal report to the class. 3. Critique short formal report of a peer. (Appendix F) 4. Prepare an agenda, an itinerary, and minutes of a meeting to be presented to class for discussion.

10. Given a newspaper article to read in a group situation, students will be able to answer orally questions related to the article with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Listening and speaking skills	1. Keep a record of the listening activities in which one engages during a day.
	2. List the listening activities necessary in the performance of the career to which one aspires. Review with class.
	3. Listen to a set of directions to a location in a nearby city without taking notes and write the instructions. Compare with classmates.
	4. Present oral reports which will be taped and listen to your communication skills.
	5. View a television talk show and give an oral report about one guest.

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

- Unit test
- Group or individual participation grades
- Checklist and/or rating sheet
- Quality of assigned tasks

EQUIPMENT AND SUPPLIES

Student

Textbook
Typing Paper
Checklists
Business Forms
Evaluation Sheets
Notepads
Instruction Sheets
Correction Devices
Pens
Pencils
Typewriters
Dictionaries
Typing Rulers

Teacher

Tests and Keys to Tests
Textbook and Manual
Blank and Prepared Transparencies
Cassette Player
Checklists
Overhead Projector
Rating Sheets
Transparency Pens
Workbooks
Blank and Prepared Forms
Blank Cassettes
Filmstrip Projector
Screen
Bulletin Board Supplies
Typewriter
Pens/Pencils
Correction Devices
Stopwatch
Chalkboard and Supplies

APPENDIX A

ADVERTISING SLOGANS GAME

Directions: The teacher reads each of the following advertising slogans to the students. On a sheet of paper, students write the name of the product described by each slogan. Answers must be precise to be correct. (Note: Advertisements for local businesses, such as banks, can be used.)

1. Orange lovers have a crush on us.
2. Oh what a relief it is.
3. I didn't make dessert, instead, I made some fun.
4. Always the smallest soap in the house.
5. Gets dishes so clean, you can see yourself.
6. Cleans circles around other leading pre-washes.
7. Coffee that is good to the last drop.
8. We are working for the day when kids won't know what a cavity feels like.
9. You deserve a break today, so get up and get away.
10. Oh what a feeling to drive.
11. The taste that calls dogs to dinner.
12. The gas with guts.
13. Strong enough for a man, but made for a woman.
14. The clean, fresh, masculine scent so many women love.
15. Fly the friendly skies.
16. I'm gonna wash that grey right out of my hair.
17. When it absolutely, positively has to be there over night.
18. Don't treat your puppy like a dog.
19. Reach out and touch someone.
20. You are behind the wheel of the world's most popular car.

APPENDIX A

ANSWER KEY

1. Orange Crush
2. Alka-Seltzer
3. Jello
4. Safeguard
5. Joy
6. Clorox Pre-Wash
7. Maxwell House
8. Crest
9. McDonald's
10. Toyota
11. Come-and-Get-Em'
12. Gulf
13. Secret
14. Old Spice
15. United Airlines
16. Loving Care
17. Federal Express
18. Puppy Chow
19. Bell Telephone
20. Ford Mustang

APPENDIX B

RUMOR GAME

The purpose of this game is to show what happens when there are too many links in the channel of communications. The teacher will read the memo given below to one student. This student will tell another student what was said in the memo. The memo will be relayed back to the class after each student has heard it.

MEMO

We have a new company policy regarding parking: All employees who drive compact cars will park in the south lot. The east side of the lot is marked "Entrance"; the west side of the lot is marked "Exit". This change is being made to prevent accidents like the one involving the truck and sports car in the north lot last month. Company trucks will continue to use the north lot.

APPENDIX C

How to say "no" without alienating the asker is very important. Write answers in which you do not "turn the inquirer off."

1. Johnny asks Terry to lend him $5 to pay for tickets to the school play. Johnny already owes Terry $2 which he borrowed last week for the football game. What will Terry say?
2. A retailer receives the following question, "What is the wholesale price of this tape recorder? A friend of mine says he can get me one at wholesale price, and I would like to know if I am getting a good deal." What would you tell him?
3. John asks Mary to go to the prom next month. Mary is hoping that the new boy who just moved in will ask her. What should Mary do?

APPENDIX D

Students will be given ten play dollars at the beginning of the six weeks. As students talk or discuss in class, others will correct grammar. One who makes the correction receives a "dollar" from the student making the error. At the end of the six weeks, students having more than their original ten dollars will get an extra point for each extra dollar earned.

APPENDIX E

QUALITIES OF EFFECTIVE BUSINESS LETTERS

1. Appearance
   Does it give a good first impression?

2. Reader's viewpoint
   Show how taking desired action will benefit reader.

3. Error free
   Proofread carefully to eliminate all errors.

4. Appreciation
   Show warmth, sense of fair play.

5. Goodwill
   Does it help to establish a reputation for honest dealings from your company?

6. Clarity and completeness
   Is the message such that no one could misunderstand it?

7. Briefness
   Does it say everything necessary in the fewest possible words?

8. Cohesiveness
   Does it carry the reader's thoughts smoothly from start to finish?

9. Good paragraphing
   Is there only one main idea to each paragraph?

10. Non-technical terminology
    Avoid terms that are unfamiliar to the reader.

APPENDIX F

CHECKLIST OF ORAL REPORTING TECHNIQUES

	EXCELLENT 4	GOOD 3	FAIR 2	POOR 1	LACKING 0
Posture					
Attractive Dress and Grooming					
Enunciation					
Pronunciation					
Eye Contact					
Facial Expressions					
Use of Gestures					
Arouse Interest of Audience					
Organization of Report					
Observance of Time Limit					
Your Score					

SUPPLEMENTARY MATERIALS

Cassettes

The Business of Oral Communication
E956 (20 audio cassettes)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Reading Comprehension
Catalog M
Learning Arts
P. O. Box 179
Wichita, KS 67201

Writing Friendly Letters, Business Letters, and Resumes
CV374CAF (6 cassettes and 6 worksheets)
Career Aids, Inc.
8950 Lurline Avenue
Dept. K45
Chatsworth, CA 91311

Filmstrips with Cassettes

Basic Writing Skills for Everyday Life
(4 filmstrips, 4 cassettes)
Resource Manual, Worksheets, and Teacher's Guide
Learning Arts
P. O. Box 179
Wichita, KS 67201

Communications: Mass Media and the Public
(4 filmstrips, 4 cassettes)
Teacher's Guide
Learning Arts
P. O. Box 179
Wichita, KS 67201

Express Yourself: The Art of Communication
(3 filmstrips, 3 cassettes)
Teacher's Guide
Learning Arts
P. O. Box 179
Wichita, KS 67201

Textbooks

Business Correspondence/30
Catalog No. 22513-3
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Business English/30
Catalog No. 34842-1
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Business English and Communications
Catalog No. 61323-0
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Transparencies

Can You Listen?
GV117-T (10 transparencies, lecture notes, competencies, and student activities)
Career Aids, Inc.
8950 Lurline Avenue
Dept. K45
Chatsworth, CA 91311

Telephone Techniques
GV118-T (10 transparencies, lecture notes, competencies, and student activities)
Career Aids, Inc.
8950 Lurline Avenue
Dept. K45
Chatsworth, CA 91311

Miscellaneous

The Gregg Reference Manual
Catalog No. 54397-6
Gregg McGraw Hill Book Company
P. O. Box 996
Norcross, GA 30091

Miscellaneous Continued

Reference Manual for Office Personnel
K45 (reference manual), K451 (study guide)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Word Division Manual
K48 (reference manual)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

RESOURCES

Cornwell, Robert C. and Darwin W. Manship. Applied Business Communications. Iowa: Wm. C. Brown Company, Publisher, 1978.

Gwyn, Jack, et al. The Business of Oral Communication: Fundamentals. Cincinnati: South-Western Publishing Company, 1980.

Gwyn, Jack, et al. The Business of Oral Communication: Selling, Speaking, Meeting. Cincinnati: South-Western Publishing Company, 1980.

Jenkins, Evelyn. Effective Listening. California: Western Tape, 1973.

Stewart, Marie M., et al. Business English and Communication. 5th ed. New York: McGraw-Hill Book Company, 1978.

Stewart, Marie M., et al. Business English and Communication. 3d ed. New York: McGraw-Hill Book Company, 1967.

Stewart, Marie M., et al. College English and Communication. 3d ed. New York: McGraw-Hill Book Company, 1975.

Wolf, Morris P., et al. Effective Communications in Business. 7th ed. Cincinnati: South-Western Publishing Company, 1979.

UNIT VII

FINANCIAL RECORDS

INTRODUCTION

Financial activities are an integral part of every business office. Therefore, this unit is designed to develop the skills necessary to process data efficiently and effectively.

Students will be given opportunities to obtain practical work experience through the use of office simulation.

COMPETENCIES

1. Develop proficiency in handling banking activities.
2. Exhibit ability to process financial statements, payroll reports, and tax returns.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Develop skills necessary for banking proficiency.
2. Process accurate financial statements.
3. Handle activities required for maintaining payroll.
4. Exhibit ability to complete tax returns.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. On a written test, students will be able to define a list of banking terminology with at least 75 percent accuracy.
2. On a written test, students will be able to complete three different banking forms in 50 minutes with at least 75 percent accuracy.
3. On a written test, students will be able to identify financial statements maintained in an office with at least 75 percent accuracy.
4. Given the necessary information in a classroom setting, students will be able to type financial statements with 100 percent accuracy.

5. Given the necessary information, students will be able to complete employees' payroll records on a written test with at least 75 percent accuracy.

6. Given specific data in a classroom setting, students will be able to prepare employees' payroll on a written test with at least 75 percent accuracy.

7. On a written test, students will be able to give three advantages and three disadvantages of manual and automated payroll systems.

8. On a written test, students will be able to prepare federal income tax returns with 100 percent accuracy.

9. On a written test, students will be able to prepare state income tax returns with 100 percent accuracy.

SUGGESTED INTEREST APPROACHES

1. Have students complete office simulation practice sets to gain practical work experience in processing and reporting financial activities in a classroom setting.

2. Invite local guest speakers to address the class on such topics as banking, tax returns, and social security.

3. Have students conduct a survey of area banks and compare services rendered by these institutions.

4. Have students complete the "Understanding Taxes" booklet (preparation of federal returns) which is distributed by the Internal Revenue Service.

5. Hold a federal and state return preparation center at school during lunch breaks to help the student body.

6. Hire (can pay with fake money) students to perform different types of school jobs (setting up projectors, typing, answering phones, etc.) for which they will be paid on an hourly basis. At the end of each week, students' wages and payroll are to be recorded and fake checks issued. Students will then be paid with fake money which can be used to purchase supplies from the school's store.

METHODOLOGY

This unit has been designed to merge various individual and group activities to develop skills in handling financial records. In addition, teacher lecture will cover material not included in group activities. The instructor must use various local, state, and national agencies as resources to provide students with current information and procedures. Some of these sources are listed in the reference section of this unit.

UNIT OUTLINE

FINANCIAL RECORDS

I. Banking

    A. Emphasizing good banking procedures
    B. Maintaining a checking account
    C. Using a savings account
    D. Becoming familiar with other banking services

II. Financial Statements

    A. Keeping accurate financial records
    B. Typing financial statements
    C. Verifying calculations on statements

III. Payroll

    A. Computing wages and salaries
    B. Maintaining payroll records
    C. Computing payroll
    D. Comparing manual and automated payroll systems

IV. Taxes

    A. Preparing federal returns
    B. Preparing state returns

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

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1. On a written test, students will be able to define a list of banking terminology with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Banking terminology	1. Complete the Word-Find Puzzle after reviewing banking terminology. (Appendix A)
	2. Prepare a bulletin board illustrating banking terms and forms.
	3. Write a report on banking services available in the community and present your findings in class.

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2. On a written test, students will be able to complete three different banking forms in 50 minutes with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Banking forms	1. Reconcile a bank statement to prove the accuracy of a checking account.
	2. Prepare checks and check stubs in payment of bills for current month and check accuracy of checkbook balance.
	3. Prepare bank deposit for a merchandising business.
	4. Complete necessary forms to open a business checking account.
	5. Exchange work completed in the preceding activities for checking and report accuracy to individual.
	6. Prepare a display illustrating the proper endorsements of checks.

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3. On a written test, students will be able to identify financial statements maintained in an office with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Financial statements	1. Prepare a display showing different types of financial statements. 2. Complete the scrambled word exercise after reviewing the financial statement terms. (Appendix B) 3. Identify from overhead transparencies financial statements and discuss the importance of each.

---

4. Given the necessary information in a classroom setting, students will be able to type financial statements with 100 percent accuracy.

Subject Matter Content	Learning Activities
Typing financial statements	1. Write a paper on the typist's responsibility in the production of final copies of financial reports and discuss in class. 2. Choose a partner and use the team method to proofread financial statements--one reads aloud from original copy while the other checks the accuracy of document. Reverse procedure and check again. 3. Record on taped media the original copy of a financial statement and check typed copy by listening to the recording as you follow on your typed copy. 4. In groups, make a list of good rules to follow in typing statements and compile a master list in class.

5. Given the necessary information, students will be able to complete employees' payroll records on a written test with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Employees payroll records	1. Prepare a bulletin board on the types of payroll forms. 2. Calculate time cards for employees and use this information to compute net pay. (Use as a group activity.) Activity could be timed. 3. Prepare a payroll register using Activity 2 and check for accuracy. 4. Prepare "employees earning records" using form from payroll register in Activity 3 and check for accuracy.

6. Given specific data in a classroom setting, students will be able to prepare employees' payroll on a written test with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Preparing employees' payroll	1. View filmstrip on payroll and discuss in class. (See Supplementary material.) 2. Prepare payroll change sheets using information given on payroll register sheets. 3. Issue voucher checks for employees using information on payroll register sheet.

7. On a written test, students will be able to give three advantages and three disadvantages of manual and automated payroll systems.

Subject Matter Content	Learning Activities
Manual and automated payroll systems	1. Research and report on manual and automated payroll systems. Report findings to the class. 2. Listen to presentation and/or view a demonstration by guest speaker on manual and automated payroll systems. Divide into groups, write advantages of each, and present to class. 3. Prepare a bulletin board comparing the two payroll systems. 4. Obtain hands-on experience by using automated office equipment supplied by local business.

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8. On a written test, students will be able to prepare federal income tax returns with 100 percent accuracy.

Subject Matter Content	Learning Activities
Federal income tax returns	1. Listen to presentation from IRS representative. 2. Prepare a federal income tax return from personal information. 3. Complete crossword puzzle in tax booklet after reviewing tax terminology. 4. Discuss the types of itemized deductions for Form 1040 and Schedule A. 5. Prepare a Tax Form 1040 with itemized deductions and check for accuracy with key.

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9. On a written test, students will be able to prepare state income tax returns with 100 percent accuracy.

Subject Matter Content	Learning Activities
Computing state income tax returns	1. Listen to presentation from local person on state income taxes and participate in class discussion. 2. Prepare a state income tax return using your completed and corrected copy of Federal Form 1040A. 3. Determine and check in class the amount of tax owed (using tax table) from situations given on teacher-prepared transparencies. 4. Exchange completed state income tax return forms with other students and check for accuracy.

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

- * Unit test
- * Problem test
- * Project grade
- * Class participation grade
- * Simulation set grade

EQUIPMENT AND SUPPLIES

Student

Textbook
Notebook
Instruction Sheets
Office Manuals
Checklists
Practice Sets
Business Forms
Pen
Pencil
Ruler
Correction Supplies

Teacher

Textbook and Manual
Transparencies
Tapes, Blank
Transparency Pens
Filmstrips and Films
Bulletin Board Materials
Construction Paper
Wall Charts and Flip Charts
Posters
Banking Forms
Payroll Forms
Accounting Forms
Federal and State Tax Returns
Practice Sets and Projects
Calculators
Overhead Projector
Filmstrip Projector
Tape Recorder
Typewriters
Computers (if available)

APPENDIX A

WORD-FIND PUZZLE

Directions: Locate the list of banking terms in the puzzle given below. Words can be found horizontally, vertically, or diagonally.

WORD LIST: account, alterations, arrears, balance, bank, bank statement, blank, canceled, cash, cashiers, certified, charge, check, deduct, deposit slip, depositor, draft, drawer, forgery, full, funds, insufficient, money order, negotiable, opening, overdraft, payee, payment, personal, petty cash, premises, reconciling, remit, restrictive, signature, special, stop payment, stub, void, voucher

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R	E	S	T	R	I	C	T	I	V	E	T	R	O	T	I	S	O	P	E	D	R	F
E	E	C	M	Q	L	Z	S	N	O	D	P	C	A	S	H	I	E	R	S	E	O	U
M	O	C	H	E	C	K	P	S	U	R	P	S	T	U	G	R	H	G	G	R	H	L
I	J	I	O	D	K	M	E	U	C	F	E	E	C	H	A	R	G	E	G	S	P	L
T	O	H	E	N	C	G	C	F	H	C	R	E	T	L	A	I	K	E	J	A	I	S
G	L	F	A	L	C	N	I	F	E	K	S	Y	J	T	B	P	R	P	Y	R	T	C
D	R	A	F	T	M	I	A	I	R	B	O	A	C	O	Y	Y	U	M	L	U	T	E
B	L	A	N	K	E	N	L	C	N	F	N	P	M	A	U	C	E	T	V	M	A	R
J	A	C	M	H	S	E	G	I	A	B	A	D	N	E	C	N	A	L	A	B	R	T
I	N	N	K	L	T	P	C	E	N	E	L	Q	T	O	T	R	P	S	U	W	R	I
P	E	M	K	D	U	O	F	N	E	G	O	T	I	A	B	L	E	T	H	R	E	F
V	O	I	D	E	B	A	L	T	E	R	A	T	I	O	N	S	C	S	A	Q	A	I
N	T	F	A	R	D	R	E	V	O	G	R	F	U	N	D	S	T	S	B	P	R	E
R	E	D	R	O	Y	E	N	O	M	P	F	S	E	R	U	T	A	N	G	I	S	D
S	T	O	P	P	A	Y	M	E	N	T	H	U	E	V	D	A	C	C	O	U	N	T
O	K	H	S	A	C	J	Z	I	D	E	P	O	S	I	T	S	L	I	P	N	O	M
B	A	N	K	S	T	A	T	E	M	E	N	T	L	W	S	E	S	I	M	E	R	P
D	E	L	E	C	N	A	C	R	D	E	D	U	C	T	S	R	E	W	A	R	D	E

APPENDIX B

SCRAMBLED WORDS

Directions: Unscramble the words, find the hidden banking terms, and place in the blank provided.

1. LNEBAAC EETHS 1. ____________________
2. IBLITESILIA 2. ____________________
3. PTCLAIA 3. ____________________
4. PTLCAIA MTTNTESEA 4. ____________________
5. ENT SOLS 5. ____________________
6. STAESS 6. ____________________
7. CLFASI DIEPOR 7. ____________________
8. NOEICM AEETSTTMN 8. ____________________
9. ETN OITFRP 9. ____________________
10. AIQUNOET 10. ____________________

Answers: 1. balance sheet 2. liabilities 3. capital 4. capital statement 5. net loss 6. assets 7. fiscal period 8. income statement 9. net profit 10. equation

APPENDIX A

WORD-FIND PUZZLE ANSWER KEY

Directions: Locate the list of banking terms in the puzzle given below. Words can be found horizontally, vertically, or diagonally.

WORD LIST: account, alterations, arrears, balance, bank, bank statement, blank, canceled, cash, cashiers, certified, charge, check, deduct, deposit slip, depositor, draft, drawer, forgery, full, funds, insufficient, money order, negotiable, opening, overdraft, payee, payment, personal, petty cash, premises, reconciling, remit, restrictive, signature, special, stop payment, stub, void, voucher

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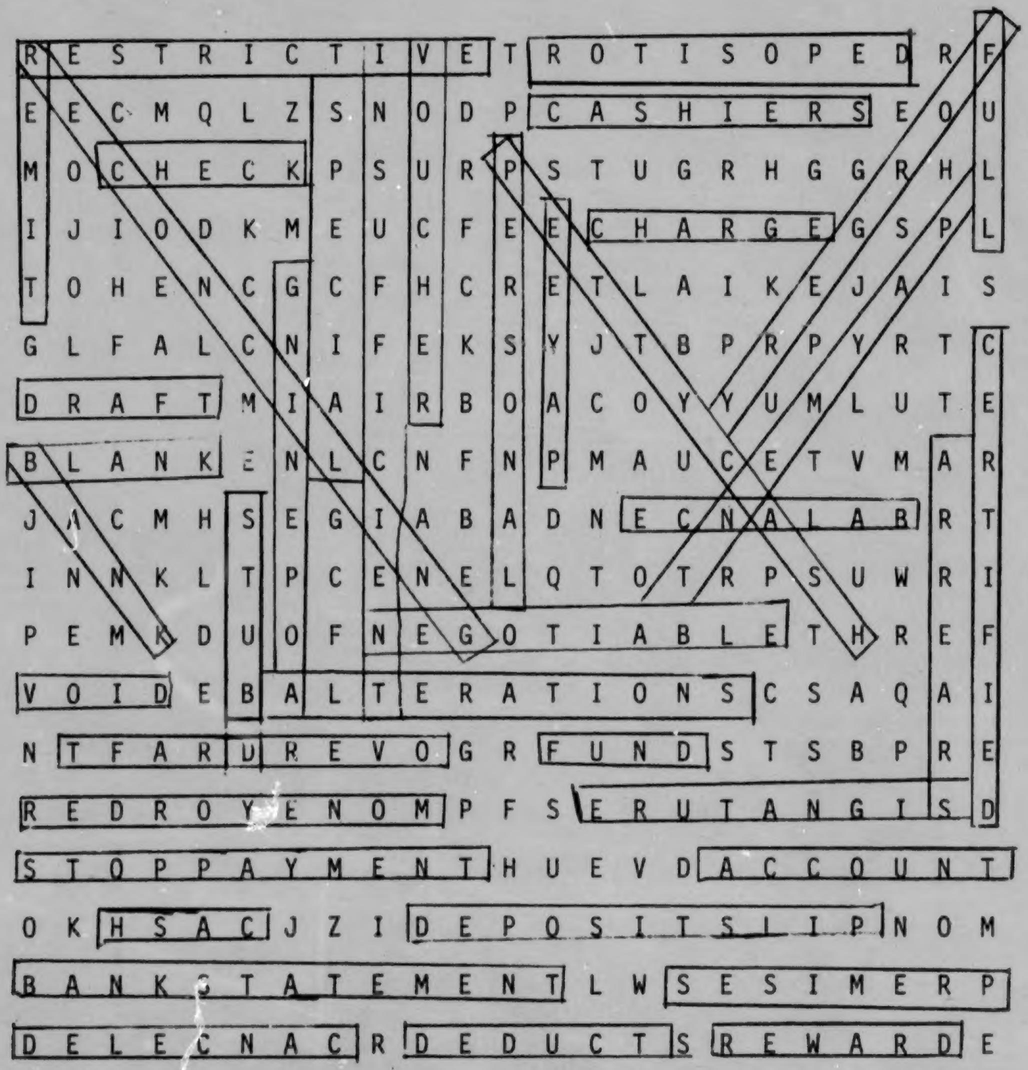

```
R E S T R I C T I V E T R O T I S O P E D R F
E E C M Q L Z S N O D P C A S H I E R S E O U
M O C H E C K P S U R P S T U G R H G G R H L
I J I O D K M E U C F E E C H A R G E G S P L
T O H E N C G C F H C R E T L A I K E J A I S
G L F A L C N I F E K S Y J T B P R P Y R T C
D R A F T M I A I R B O A C O Y Y U M L U T E
B L A N K E N L C N F N P M A U C E T V M A R
J A C M H S E G I A B A D N E C N A L A B R T
I N N K L T P C E N E L Q T O T R P S U W R I
P E M K D U O F N E G O T I A B L E T H R E F
V O I D E B A L T E R A T I O N S C S A Q A I
N T F A R D R E V O G R F U N D S T S B P R E
R E D R O Y E N O M P F S E R U T A N G I S D
S T O P P A Y M E N T H U E V D A C C O U N T
O K H S A C J Z I D E P O S I T S L I P N O M
B A N K S T A T E M E N T L W S E S I M E R P
D E L E C N A C R D E D U C T S R E W A R D E
```

SUPPLEMENTARY MATERIALS

Filmstrips with Cassettes

All About Banking

4 cassettes; 4 filmstrips, 1975
Learning Arts
Box 179
Wichita, KS 67201

Banking, Financing, and Budgeting

4 cassettes; 4 filmstrips
Learning Arts
Box 179
Wichita, KS 67201

Financial Statements Explained

5 cassettes; 5 filmstrips, 1979
Learning Arts
Box 179
Wichita, KS 67201

Income Tax

3 cassettes; 5 filmstrips
Learning Arts
Box 179
Wichita, KS 67201

A Job-Training/Office Simulation Approach to Record Keeping

Sound Filmstrip with cassette (13236-4)
Cotton, L. Joseph, Judith Lima, and Donald Koeppen, 1976.
Gregg McGraw-Hill
P. O. Box 996
Norcross, GA 30091

Money Management Series

11 cassettes; 11 filmstrips
Learning Arts
Box 179
Wichita, KS 67201

What Is in a Paycheck?

1 cassette; 1 filmstrip
Learning Arts
Box 179
Wichita, KS 67201

Practice and Simulation Sets

Business Simulation

Gregory James Co.
Seventh Edition, Caldwell, G145
South-Western Publishing Co.
11310 Gemini Lane
Dallas, TX 75229

Clerical Payroll Procedures

Fuller. Eighth Edition. K52
South-Western Publishing Co.
11310 Gemini Lane
Dallas, TX 75229

Personal Record Keeping Practice Set

Wood. 1976 (71621-8)
Gregg McGraw-Hill
P. O. Box 996
Norcross, GA 30091

Practical Record Keeping Practice Set

Fifth Edition, Baggett, B055
South-Western Publishing Co.
11310 Gemini Lane
Dallas, TX 75229

Projects In Clerical Record Keeping

Rosenberg. Fourth Edition, K28
K283 Restaurant Records, Reports and Payroll
K285 Payroll Records
South-Western Publishing Co.
11310 Gemini Lane
Dallas, TX 75229

Village Garden Center Business Simulation Set

B245, Pegboard Payroll System
South-Western Publishing Co.
11310 Gemini Lane
Dallas, TX 75229

Textbooks

Clerical and Related Occupations

1970
West Virginia State Board of Education
Bureau of Vocational, Technical, and Adult Education
Charleston, WV 25300

General Record Keeping
1976
Gregg McGraw-Hill Company
P. O. Box 996
Norcross, GA 30091

Payroll Record Keeping
1965
Gregg McGraw-Hill Company
P. O. Box 996
Norcross, GA 30091

Payroll Systems and Procedures
1970
Gregg McGraw-Hill Company
P. O. Box 996
Norcross, GA 30091

Practical Record Keeping
1975
South-Western Publishing Co.
11310 Gemini Lane
Dallas, TX 75229

RESOURCES

"Bookkeeping/Accounting/Payroll Clerk." State of Alabama, Department of Education, 1978.

Cooperative Office Education Curriculum Guidelines. State of Louisiana, Department of Education. Bulletin No. 1246, 1974.

Curriculum Guides for Business and Office Education. Louisiana State Department of Education, 1974.

Pasewark, Williams R. and Mary Ellen Oliverio. Clerical Office Procedures. Cincinnati: South-Western Publishing Company, 1978.

Stewart, Jeffery R., Jr., et al. Office Procedures. Dallas: McGraw-Hill Book Company, 1980.

"Understanding Taxes, 1982." Department of the Treasury, Internal Revenue Service, Publication 21.

UNIT VIII

BUSINESS MATH/MACHINES

INTRODUCTION

Mastery of basic math is recognized as an important basic skill for success in the business world. This unit allows the students to become familiar with the various problems of the business world and to learn to compute accurate answers using both mental and machine calculations.

The students will be given activities to reinforce their mathematical skills and opportunities to apply those skills when using calculating machines to solve basic business problems.

COMPETENCIES

1. Perform basic math processes with emphasis on speed, accuracy, and neatness.
2. Develop techniques and skills necessary for employment using calculating machines.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Demonstrate proficiency in the four fundamental math operations as applied to whole, fractional, and decimal numbers.
2. Utilize percent to solve problems.
3. Demonstrate the proper use of calculating machines.
4. Solve business problems using calculating machines.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. Given 25 problems involving all math functions with whole numbers, students will be able to compute the answers on a written test with at least 75 percent accuracy.

2. Given 25 problems involving all math functions with fractions, students will be able to compute the answers on a written test with at least 75 percent accuracy.

3. Given 25 problems involving all math functions with decimals, students will be able to compute the answers on a written test with at least 75 percent accuracy.

4. Given 25 problems using percentages, students will be able to compute the answers on a written test with at least 75 percent accuracy.

5. Given an illustration of a calculating machine, students will be able to identify the parts of the machine and the function of each in class with at least 75 percent accuracy.

6. Given a calculating machine and problems, students will be able to demonstrate the proper touch control techniques on a 20-minute test with at least 75 percent accuracy.

7. Given a sales commissions report, sales slip, invoice, and a payroll register, students will be able to complete each form in class using a calculating machine with at least 75 percent accuracy.

SUGGESTED INTEREST APPROACHES

1. Give a pre-test to determine the students' mathematical competencies and weaknesses.

2. Invite a representative from a local office equipment firm to demonstrate operation and use of various machines.

METHODOLOGY

This unit has been designed to build mathematical skills and develop proficiency on calculating machines. Instruction will include demonstrations, observations, visual aids, job instruction sheets, timed drills, and tests.

UNIT OUTLINE

BUSINESS MATH/MACHINES

I. Basic Arithmetic Skills Review--All Math Functions

   A. Whole numbers
   B. Fractions
   C. Decimals
   D. Percent

II. Adding/Calculating Machines

   A. Machine operation/maintenance
   B. Touch control techniques
   C. Machine use

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

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1. Given 25 problems involving all math functions with whole numbers, students will be able to compute the answers on a written test with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Whole numbers	1. Match the words associated with whole numbers to the correct definitions. (Appendix A) 2. Give the place value of each digit in a six-digit number. (Appendix B) 3. Round numbers to the nearest 10's, 100's, and 1000's. (Appendix C) 4. Solve problems involving addition and subtraction of whole numbers. (Appendix D) 5. Solve problems involving the multiplication and division of whole numbers. (Appendix E)

2. Given 25 problems involving all math functions with fractions, students will be able to compute the answers on a written test with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Fractions	1. Identify the numerator and the denominator of each given fraction and classify fractions as proper, improper, or mixed. (Appendix F) 2. Write equivalent fractions for the fractions given. (Appendix G) 3. Reduce fractions to lowest terms, convert mixed numbers to improper fractions, and convert improper fractions to mixed numbers or whole numbers. (Appendix H) 4. Find the sums, differences, products, and quotients, reducing all answers to lowest terms. (Appendix I)

3. Given 25 problems involving all math functions with decimals, students will be able to compute the answers on a written test with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Decimals	1. Identify the place value of each digit in a numeral with six decimal places. (Appendix J) 2. Round decimals to the nearest whole number, tenth, hundredth, or thousandth. (Appendix K) 3. Find the sums, differences, products, and quotients, placing the decimal points in the correct position in the answers. (Appendix L) 4. Multiply and divide by 10, 100, and 1,000. (Appendix M)

4. Given 25 problems using percentages, students will be able to compute the answers on a written test with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Percents	1. Write percents as decimals, decimals as percents, and percents as fractions. (Appendix N)
	2. Compute the amount of interest on a loan using the simple interest formula. (Appendix O)
	3. Find the amount expended for each item in a family budget. (Appendix P)

5. Given an illustration of a calculating machine, students will be able to identify the parts of the machine and the function of each in class with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Machine operation/ maintenance	1. Identify the machine parts on the illustration provided. Teacher will provide illustration of machine used.
	2. Match each machine part with its function. Teacher will provide illustration of machine used.
	3. List the work habits desired for efficient machine operation. Compile class list from individual lists.
	4. Demonstrate correct ribbon replacement and paper roll replacement on machine provided.

6. Given a calculating machine and problems, students will be able to demonstrate the proper touch control techniques on a 20-minute test with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Touch control techniques	1. Practice reaches using the touch-control techniques.
	2. Prepare a bulletin board showing correct touch techniques.
	3. Demonstrate the proper touch control techniques (Appendix Q)

7. Given a sales commissions report, sales slip, invoice, and a payroll register, students will be able to complete each form in class using a calculating machine with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Machine use	1. Complete printed business forms.
	2. Proofread completed forms.
	3. Prepare a bulletin board using various business forms.

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

- Unit test
- Accuracy of daily work
- Timed drills
- Touch techniques

EQUIPMENT AND SUPPLIES

Student

- Adding/Printing Machine Tape
- Pen/Pencil
- Text/Workbook
- Machine Instructional Manual
- Checklist
- Calculating Machine
- Practice Set
- Machine Ribbons
- Activity Sheets
- Current Tax Tables

Teacher

- Calculating Machine
- Machine Ribbons
- Adding/Printing Machine Tape
- Films
- Film Projector
- Transparencies
- Transparency Pens
- Overhead Projector
- Practice Set
- Timer and/or Stop Watch
- Texts and Instructional Manuals
- Checklist
- Activity Sheets
- Bulletin Board Supplies
- Current Tax Tables

APPENDIX A

WHOLE NUMBERS

Name ______________________________________ Score __________

Match the correct definitions to the terms on the right. Write the appropriate numbers in the blanks.

____ a. Numbers may be expressed by any one of the ten symbols, 0 to 9

____ b. Numbers that are added together

____ c. Numbers that are multiplied

____ d. Answer to a multiplication problem

____ e. Number that is being subtracted from another number

____ f. Number by which you divide

____ g. Answer to an addition problem

____ h. Number from which another number is subtracted

____ i. Answer to a subtraction problem

____ j. Answer to a division problem

____ k. Number which is left over when division is completed

____ l. Number to be divided

1. Addends
2. Difference
3. Digit
4. Dividend
5. Divisor
6. Factors
7. Minuend
8. Product
9. Quotient
10. Remainder
11. Subtrahend
12. Sum or total

APPENDIX B

WHOLE NUMBERS

Name ______________________________ Score ____________

I. Name the place values in the number 623,412.

a. 6 -- ______________________________

b. 2 -- ______________________________

c. 3 -- ______________________________

d. 4 -- ______________________________

e. 1 -- ______________________________

f. 2 -- ______________________________

II. Use the numeral 758,216,934 to complete the following exercise.

a. Which digit is in hundred's place? ____________

b. Which digit is in ten's place? ____________

c. Which digit is in one's place? ____________

d. Which digit is in ten thousand's place? ____________

e. Which digit is in thousand's place? ____________

f. Which digit is in million's place? ____________

g. Which digit is in ten million's place? ____________

h. Which digit is in hundred thousand's place? ____________

i. Which digit is in hundred million's place? ____________

III. Write the place value of each 2 in the following numerals.

a. 134,527 ____________ e. 3,675,402 ____________

b. 926,473 ____________ f. 21,701,390 ____________

c. 2,704 ____________ g. 7,329,648 ____________

d. 1,247,658 ____________ h. 39,077,201 ____________

APPENDIX C

WHOLE NUMBERS

I. Round to the nearest ten.

a. 93 =
b. 590 =
c. 9,360 =
d. 475 =
e. 468 =
f. 4,958 =
g. 23 =
h. 907 =
i. 678,345 =
j. 92,177 =

II. Round to the nearest hundred.

a. 459 =
b. 8,910 =
c. 945 =
d. 429 =
e. 5,923 =
f. 234 =
g. 337 =
h. 4,685 =
i. 6,793 =
j. 933 =

III. Round to the nearest thousand.

a. 4,780 =
b. 5,653 =
c. 9,023 =
d. 23,567 =
e. 178,538 =
f. 52,905 =
g. 2,469 =
h. 44,689 =
i. 20,890 =
j. 29,789 =

APPENDIX D

I. Complete the following sales budget record - addition.

SALES BUDGET FOR PERIOD JAN-JUN.

BY DEPARTMENT

DEPT.	JAN.	FEB.	MARCH	APR.	MAY	JUNE	TOTAL
1	1,100	2,000	2,300	2,025	1,000	2,200	
2	2,700	2,100	3,000	2,700	1,100	2,500	
3	1,800	3,200	1,200	3,650	2,550	1,500	
4	3,100	2,200	1,600	1,975	2,500	3,500	
TOTALS							

II. Complete the following problems dealing with subtraction.

a. 10,199
9,995

b. 84,576
3,989

c. 1,046
659

d. 622
555

e. 49
37

f. 19,000
18,889

g. 73,681
32,492

h. 2,255
1,939

i. 329
251

j. 85
68

APPENDIX E

I. Multiplication of whole number:

What is the product of each of the following problems?

a. 34 x 4 = ________ b. 12 x 5 = ________ c. 9 x 9 = ________

d. 33 x 16 = ________ e. 15 x 5 = ________ f. 3 x 20 = ________

g. 3 x 9 = ________ h. 4 x 4 = ________ i. 8 x 8 = ________

II. Division of whole number:

Find the quotient in each problem.

a. $\frac{340}{20}$ = ______ b. $\frac{462}{33}$ = ______ c. $\frac{783}{87}$ = ______

d. $\frac{418}{11}$ = ______ e. $\frac{220}{22}$ = ______ f. $\frac{850}{17}$ = ______

g. $\frac{48}{8}$ = ______ h. $\frac{500}{25}$ = ______ i. $\frac{18}{6}$ = ______

j. $\frac{105}{5}$ = ______ k. $\frac{400}{80}$ = ______

APPENDIX F

FRACTIONS

Name ______________________________ Score ________________

I. In the following fractions identify the numerator and the denominator of each by filling in the blanks.

a. In the fraction 3/4, the numerator is ____ and the denominator is ____.

b. In the fraction 1/2, the numerator is ____ and the denominator is ____.

II. Write fractions that fit the following statements.

a. A fraction with a denominator of 15 and a numerator of 2. ____________________

b. A fraction with a numerator of 13 and a denominator of 35. ____________________

III. A boy cuts a pie into 8 equal pieces and then gives his friend 1 of the 8 pieces.

a. Which number represents the numerator? ________________

b. Which number represents the denominator? ________________

c. What fractional part of the pie did the boy give away? _____

IV. Identify the following numbers by placing "P" for proper fraction, "I" for the improper fraction, or "M" for mixed number in the blanks.

_____ a. 3/4
_____ b. 1/4
_____ c. 1/1
_____ d. 16/2
_____ e. 4/4
_____ f. 8 1/3
_____ g. 9 3/3
_____ h. 7/3

APPENDIX G

FRACTIONS

Name ______________________________ Score ________________

I. Write four different fractions that are equivalent to the number one.

a. __________ c. __________

b. __________ d. __________

II. Write two different equivalent fractions for the fractions given.

a. 1/2 = ________ ________ d. 1/4 = ________ ________

b. 2/5 = ________ ________ e. 1/3 = ________ ________

c. 4/5 = ________ ________ f. 3/8 = ________ ________

III. Write each of the following equivalent fractions as indicated.

a. 2/3 = ______/18__ d. 1/5 = ______/30__

b. 1/8 = ______/24__ e. 2/7 = ______/21__

c. 2/10 = ______/40__ f. 7/9 = ______/81__

APPENDIX H

FRACTIONS

I. Reduce each fraction to its lowest term.

a. $\frac{10}{12}$ ________

b. $\frac{9}{15}$ ________

c. $\frac{28}{48}$ ________

d. $\frac{8}{12}$ ________

e. $\frac{6}{9}$ ________

f. $\frac{35}{49}$ ________

II. Change each improper fraction to a mixed number.

a. $\frac{13}{7}$ ________

b. $\frac{26}{12}$ ________

c. $\frac{62}{23}$ ________

d. $\frac{21}{8}$ ________

e. $\frac{47}{15}$ ________

f. $\frac{48}{16}$ ________

III. Change each mixed number to an improper fraction.

a. $3\frac{2}{3}$ ________

b. $8\frac{3}{4}$ ________

c. $6\frac{5}{6}$ ________

d. $12\frac{1}{2}$ ________

e. $21\frac{3}{5}$ ________

f. $14\frac{7}{8}$ ________

APPENDIX I

Name ______________________ Score ______________

Compute the following problems. Express your answers in lowest terms.

a. $\begin{array}{r} \frac{3}{8} \\ -\ \frac{1}{3} \\ \hline \end{array}$

b. $\begin{array}{r} \frac{2}{3} \\ +\ \frac{3}{4} \\ \hline \end{array}$

c. $\begin{array}{r} 2\frac{1}{2} \\ -\ 1\frac{3}{4} \\ \hline \end{array}$

d. $\begin{array}{r} 3\frac{2}{5} \\ +\ 1\frac{1}{2} \\ \hline \end{array}$

e. $1\frac{1}{2} \times \frac{3}{4} =$

f. $\dfrac{2\frac{1}{14}}{1\frac{1}{2}} =$

g. $\begin{array}{r} \frac{7}{8} \\ -\ \frac{1}{3} \\ \hline \end{array}$

h. $\begin{array}{r} \frac{3}{5} \\ +\ \frac{3}{4} \\ \hline \end{array}$

i. $\begin{array}{r} 3\frac{1}{3} \\ -\ 2\frac{3}{4} \\ \hline \end{array}$

j. $\begin{array}{r} 2\frac{1}{7} \\ +\ 5\frac{2}{5} \\ \hline \end{array}$

k. $6\frac{7}{8} \times \frac{1}{5} =$

l. $\dfrac{\frac{1}{3}}{\frac{5}{8}} =$

APPENDIX J

DECIMALS

Name ______________________________ Score ________________

I. Write the place value of each of the digits in 0.867293.

a. 3 = ______________________________

b. 9 = ______________________________

c. 2 = ______________________________

d. 7 = ______________________________

e. 6 = ______________________________

f. 8 = ______________________________

II. Complete the following statements.

EXAMPLE: In the number 0.587613, 5 means 5 tenths

a. In the number 0.587613, 8 means 8 ________________

b. In the number 0.587613, 7 means 7 ________________

c. In the number 0.587613, 6 means 6 ________________

d. In the number 0.587613, 1 means 1 ________________

e. In the number 0.587613, 3 means 3 ________________

APPENDIX K

DECIMALS

Name ______________________________ Score ____________

I. Round the following decimals to the nearest whole number.

a. 5.8 =
b. 1.5 =
c. 43.51 =
d. 2.50395 =
e. 43.219 =
f. 344.61 =

II. Round the following decimals to the nearest tenth.

a. 3.12 =
b. 33.32 =
c. 1.61 =
d. 15.24 =
e. 34.33 =
f. 3.72 =

III. Round the following decimals to the nearest hundredth.

a. 1.346 =
b. 23.995 =
c. 9.0378 =
d. 345.697 =
e. 55.9356 =
f. 77.893 =

IV. Round the following decimals to the nearest thousandth.

a. 0.6790 =
b. 12.9903 =
c. 332.69403 =
d. 3.6932 =
e. 678.3590 =
f. 59.33092 =

APPENDIX L

DECIMALS

Name ______________________________ Score ______________

I. Add the following decimals, locating the decimal points in the sums or totals.

a. 2.7 + 4.8 =

b. 937 + 0.066 =

c. 478 + 41.801 =

d. $\begin{array}{r} 2.5 \\ +\ 29 \\ \hline \end{array}$

e. $\begin{array}{r} 43.0901 \\ +\ 7.25 \\ \hline \end{array}$

II. Subtract the following decimals, locating the decimal points in the difference.

a. 379 - 4.57 =

b. .56 - .0123 =

c. 53.69 - 2.54 =

d. 490.25 - 8.3301 =

e. 1.098 - .653 =

f. 23 - .25 =

III. Multiply the following decimals, locating the decimal points in the products.

a. 2.57 x 83 =

b. .019 x 24.3 =

c. 51.790 x 4.32 =

d. 34.02 x 44.23 =

e. 678 x .25 =

f. 33 x 8.90 =

IV. Divide the following decimals by decimals, locating the decimal points in the quotients.

a. $0.2\overline{)5.3301}$

b. $3.255\overline{)5689.1}$

c. $55.1\overline{)3156.902}$

d. $3.2\overline{)34.562}$

e. $35.1\overline{)923014}$

f. $22.2\overline{)45709.12}$

APPENDIX M

DECIMALS

Name ______________________________ Score ____________________

I. Multiply these problems.

a. $\begin{array}{r} 354 \\ \times\ 10 \\ \hline \end{array}$ b. $\begin{array}{r} 34.5241 \\ \times\ 100 \\ \hline \end{array}$ c. $\begin{array}{r} 34.913 \\ \times\ 100 \\ \hline \end{array}$

d. $\begin{array}{r} 5198.7 \\ \times\ 100 \\ \hline \end{array}$ e. $\begin{array}{r} 459.235 \\ \times\ 100 \\ \hline \end{array}$ f. $\begin{array}{r} 0.00678 \\ \times\ 1000 \\ \hline \end{array}$

II. Divide these problems.

a. $\frac{298}{10} =$ b. $\frac{4.901}{100} =$

c. $\frac{4509}{1000} =$ d. $\frac{590123}{1000} =$

e. $\frac{65.19}{10} =$ f. $\frac{45.08}{100} =$

APPENDIX N

PERCENT

I. Write each percent as a decimal.

a. 67% ________

b. 15% ________

c. 8% ________

d. 125% ________

e. 82% ________

f. 6.2% ________

II. Write each decimal as a percent.

a. .42 ________

b. .02 ________

c. .89 ________

d. 1.03 ________

e. .007 ________

f. .9 ________

III. Write each percent as a fraction.

a. 15% ________

b. 65% ________

c. 120% ________

d. 5% ________

e. 20% ________

f. 12½% ________

IV. Write each fraction as a percent.

a. 1/4 ________

b. 5/8 ________

c. 2/3 ________

d. 7/8 ________

e. 1/2 ________

f. 5/6 ________

APPENDIX O

SIMPLE INTEREST

Problem 1. Using the simple interest formula:

Interest = Principal x Rate x Time (Years)

find the interest on a $1,200 loan for 8 months at an interest rate of 6%.

Solution: $I = P \times R \times T$

$$I = \$1{,}200 \times \underline{\qquad}\% \times \frac{\underline{\qquad}}{12}$$

$$I = \underline{\qquad\qquad\qquad}$$

Problem 2. When the time is shown in days, consider each month to have 30 days, with a total of 360 days in a year. Find the interest on a $1,200 loan made on July 6 and due on September 16, with interest at 6%.

Solution: $I = P \times R \times T$

Length of time = __________ days

$$I = \$\underline{\qquad\quad} \times \underline{\qquad}\% \times \frac{\underline{\qquad}}{360}$$

$$I = \underline{\qquad\qquad\qquad}$$

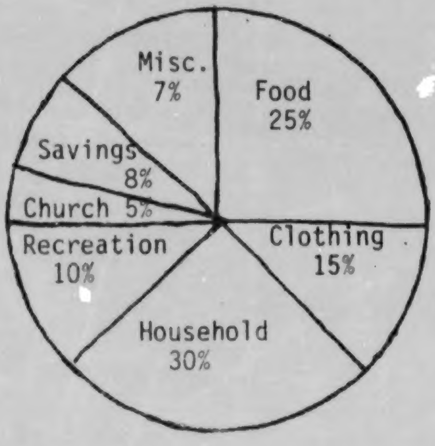
Problem 3. Fill in the chart below.

	Principal	Rate	Time	Interest
1.	$2,400	6%	240 days	
2.	$1,500	8%	90 days	
3.	$1,800	10%	9 mo.	
4.	$3,600	7½%	10 mo.	
5.	$1,400	5%	May 10 to Nov. 6	

APPENDIX P

FAMILY BUDGET

I. Jim Mann's net earnings for the month are $1,200. The chart below shows his expenditures for the month. Find the amount spent for each item on the chart.



a. Household $__________

b. Food $__________

c. Clothing $__________

d. Savings $__________

e. Recreation $__________

f. Church $__________

g. Miscellaneous $__________

II. Mary Smith receives $150 a month for her college expenses. The list below shows how she will spend her money this month. Find what percent she has budgeted for each item.

a. Books $24 or ______%

b. Clothes $50 or ______%

c. Recreation $25 or ______%

d. Miscellaneous $30 or ______%

e. Savings $21 or ______%

APPENDIX Q

CHECKLIST FOR TOUCH-CONTROL TECHNIQUES

Name of Student ______________________________ Date ____________

	Excellent	Strong	Average	Weak	Poor
1. Knowledge of keyboard					
2. Relaxed position in front of machine					
3. Feet on the floor					
4. Fingers well curved					
5. Correct home-row position					
6. Finger-reach with fingers close to keys					
7. Hands, wrists, and arms relaxed					
8. Uniform key-stroking					
9. Keys struck with correct finger					
10. Instant key release					
11. Eyes on copy					
12. Speed potential					
13. Accuracy potential					
14. Work habits					
15. Arrangement of materials					
16. Follows directions					
17. Rhythm pattern continuous					
18. Strives for improvement					
19. Concentrates on copy					
20. Practices with purpose					

ANSWER KEY

APPENDICES A, B, AND C

APPENDIX A

a. 3
b. 1
c. 6
d. 8
e. 11
f. 5
g. 12
h. 7
i. 2
j. 9
k. 10
l. 4

APPENDIX B

Part I

a. 6 -- hundred thousands
b. 2 -- ten thousands
c. 3 -- thousands
d. 4 -- hundreds
e. 1 -- tens
f. 2 -- ones

Part II

a. 9
b. 3
c. 4
d. 1
e. 6
f. 8
g. 5
h. 2
i. 7

Part III

a. tens
b. ten thousands
c. thousands
d. hundred thousands
e. ones
f. ten millions
g. ten thousands
h. hundreds

APPENDIX C

Part I

a. 9
b. 59
c. 936
d. 48
e. 47
f. 496
g. 2
h. 91
i. 67,835
j. 9,218

Part II

a. 500
b. 8,900
c. 900
d. 400
e. 5,900
f. 200
g. 300
h. 4,700
i. 6,800
j. 900

Part III

a. 5,000
b. 6,000
c. 9,000
d. 24,000
e. 179,000
f. 53,000
g. 2,000
h. 45,000
i. 21,000
j. 30,000

ANSWER KEY

APPENDICES D AND E

APPENDIX D

Part I

Totals -- across

Dept. 1	10,625	Dept. 3	13,900
Dept. 2	14,100	Dept. 4	14,875

Totals -- down

Jan.	8,700	Apr.	10,350
Feb.	9,500	May	7,150
March	8,100	June	9,700

Grand total -- $53,500

Part II

a. 204
b. 80,587
c. 387
d. 67
e. 12
f. 111
g. 41,189
h. 316
i. 78
j. 17

APPENDIX E

Part I

a. 136
b. 60
c. 81
d. 528
e. 75
f. 60
g. 27
h. 16
i. 64

Part II

a. 17
b. 14
c. 9
d. 38
e. 10
f. 50
g. 6
h. 20
i. 3
j. 21
k. 5

ANSWER KEY

APPENDICES F AND G

APPENDIX F

Part I

a. 3,4

b. 1,2

Part II

a. 2/15

b. 13/35

Part III

a. 1

b. 8

c. 1/8

Part IV

a. P
b. P
c. I
d. I
e. I
f. M
g. M
h. I

APPENDIX G

Part I

a. 2/2

b. 3/3

c. 4/4

d. 5/5

Part II

a. 2/4, 3/6
b. 4/10, 6/15
c. 8/10, 12/15
d. 2/8, 3/12
e. 2/6, 3/9
f. 6/16, 9/24

Part III

a. 12/18
b. 3/24
c. 8/40
d. 6/30
[illegible]. 6/21
f. 63/81

ANSWER KEY

APPENDICES H, I, AND J

APPENDIX H

Part I

a. 5/6
b. 3/5
c. 7/12
d. 2/3
e. 2/3
f. 5/7

Part II

a. 1 6/7
b. 2 1/6
c. 2 16/23
d. 2 5/8
e. 3 2/15
f. 3

Part III

a. 11/3
b. 35/4
c. 41/6
d. 25/2
e. 108/5
f. 119/8

APPENDIX I

a. 1/24
b. 1 5/12
c. 3/4
d. 4 9/10
e. 1 1/8
f. 1 8/21
g. 13/24
h. 1 7/20
i. 7/12
j. 7 19/35
k. 1 3/8
l. 8/15

APPENDIX J

Part I

a. millionths
b. hundred thousandths
c. ten thousandths
d. thousandths
e. hundredths
f. tenths

Part II

a. hundredths
b. thousandths
c. ten thousandths
d. hundred thousandths
e. millionths

ANSWER KEY

APPENDICES K AND L

APPENDIX K

Part I

a. 6
b. 2
c. 44
d. 3
e. 43
f. 345

Part II

a. 3.1
b. 33.3
c. 1.6
d. 15.2
e. 34.3
f. 3.7

Part III

a. 1.35
b. 24.00
c. 9.04
d. 345.70
e. 55.94
f. 77.89

Part IV

a. .679
b. 12.990
c. 332.694
d. 3.693
e. 678.359
f. 59.331

APPENDIX L

Part I

a. 7.5
b. 937.066
c. 519.801
d. 31.5
e. 50.3401

Part II

a. 374.43
b. .5477
c. 51.15
d. 481.9199
e. .445
f. 22.75

Part III

a. 213.31
b. .4617
c. 223.7328
d. 1504.7046
e. 169.5
f. 293.7

Part IV

a. 26.6505
b. 1764.062
c. 57.29404
d. 10.800625
e. 26296.695
f. 2058.9693

ANSWER KEY

APPENDICES M AND N

APPENDIX M

Part I

a. 3,540
b. 3,452.41
c. 3491.3
d. 519,870
e. 45,923.5
f. 6.78

Part II

a. 29.8
b. .04901
c. 4.509
d. 590.123
e. 6.519
f. .4508

APPENDIX N

Part I

a. .67
b. .15
c. .08
d. 1.25
e. .82
f. .062

Part II

a. 42%
b. 2%
c. 89%
d. 103%
e. .7%
f. 90%

Part III

a. 3/20
b. 13/20
c. 6/5
d. 1/20
e. 1/5
f. 1/8

Part IV

a. 25%
b. 62 1/2%
c. 66 2/3%
d. 87 1/2%
e. 50%
f. 83 1/3%

ANSWER KEY

APPENDICES O AND P

APPENDIX O

Problem 1

Solution: $I = P \times R \times T$

$$I = \$1200 \times 6\% \times \frac{8}{12}$$

$I = \$48$

Problem 2

Solution: $I = P \times R \times T$

Length of time = 72 days

$$I = \$1200 \times 6\% \times \frac{72}{360}$$

$I = \$14.40$

Problem 3

1. $ 96.00
2. $ 30.00
3. $135.00
4. $225.00
5. $ 35.00

APPENDIX P

Part I

a. $360.00
b. $300.00
c. $180.00
d. $ 96.00
e. $120.00
f. $ 60.00
g. $ 84.00

Part II

a. 16%
b. 33 1/3%
c. 16 2/3%
d. 20%
e. 14%

SUPPLEMENTARY MATERIALS

Film/Filmstrip

Accounting and Calculating Machines
Teaching Aids Incorporated
307 South B Street
San Mateo, CA 94401

Ten-Key Touch Training Course
Educational Developmental Laboratories, Inc.
284 East Pulaski Road
Huntington, NY 11743

Simulations

Calculating Machines Simulation
3d edition
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Clerical Payroll Procedures
8th edition
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P. O. Box 996
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Box 658
Portland, ME 04104-0658

Duplicator Masters for Basic Math
J. Weston Walch
Box 658
Portland, ME 04104-0658

Textbooks

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The University of Texas at Austin
200 West 21st Street
Austin, TX 78712

Calculator Applications for Business Careers
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Consumer Economic Problems
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Electronic Display Calculator Course
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

How to Use Adding and Calculating Machines
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Math in Everyday Life
J. Weston Walch
Box 658
Portland, ME 04104-0658

Mathematics for the Consumer
3d edition
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Mathematics Skill Builder
4th edition
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Vocational Math for Business
2d edition
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

RESOURCES

Cornelia, Nicholas J., et al. Office Machines Course, 5th edition. Cincinnati: South-Western Publishing Company, 1979.

Fairbank, Roswell E. and Robert A. Schultheis. Applied Business Mathematics, 11th edition. Cincinnati: South-Western Publishing Company, 1980.

Huffman, Harry, et al. Math for Business Careers. New York: Gregg McGraw-Hill Book Company, 1975.

Mason, Louis D. Challenges in Business Math. Portland: J. Weston Walch, 1979.

Nelson, Frank E. Group Instruction for Cooperative Programs. Stillwater: State Department of Vocational and Technical Education, 1978.

Pasewark, William R. Electronic Printing Calculator, 2d edition. Cincinnati: South-Western Publishing Company, 1982.

Pasewark, William R. Ten-Key Listing Machine, 5th edition. Cincinnati: South-Western Publishing Company, 1981.

Voelker, Pamela. "A Motivational Technique for Business Math." The Balance Sheet, September, 1977.

UNIT IX

TYPING REVIEW

INTRODUCTION

Typewriting skills are an essential element for successful office employment. Therefore, this unit has been designed to improve the student's typewriting skills and knowledge. The emphasis will be on development of decision-making skills used by all office personnel.

COMPETENCIES

1. Increase typewriting proficiency.
2. Produce mailable business documents.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Exhibit ability to produce mailable business letters and other office communications.
2. Increase production typewriting proficiency.
3. Improve correction and proofreading skills.
4. Develop ability to properly care for and maintain typewriter.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. Given business letters in unarranged form on a production test, students will be able to produce three mailable letters in 50 minutes.
2. After a classroom review on tabulation, students will be able to type two tables with correct horizontal and vertical placement in 40 minutes.
3. Given a manuscript in rough-draft form, students will be able to complete in class a multiple-page manuscript with at least 75 percent accuracy.
4. Given a five-minute timed writing test, students will be able to demonstrate a 10 percent increase in speed and accuracy on straight-copy material.

5. Using printed forms, students will be able to type in class the requested information with 100 percent accuracy.

6. In producing mailable copy in class, students will be able to use one correction method effectively.

7. Given business letters in arranged form, the students will be able to produce in class two mailable letters and carbon copies with at least 75 percent accuracy.

8. After a classroom demonstration, students will be able to exhibit ability to change a ribbon on a typewriter in ten minutes.

SUGGESTED INTEREST APPROACHES

1. Give sprint drills to increase speed in typewriting.

2. Keep a bar graph of timed writing results. Post gains in speed following each timed writing.

3. Award certificates for timed writing achievement.

METHODOLOGY

This unit on typing review is designed to provide students with an opportunity to work individually and in groups. In addition, a minimum amount of lecture for review, discussions, and teacher demonstration will be used.

UNIT OUTLINE

TYPING REVIEW

I. Business Letters

   A. Parts of a business letter
   B. Letter styles and punctuation styles
   C. Placement
   D. Envelopes--typing, folding, and inserting
   E. State abbreviations and ZIP codes

II. Tabulation

   A. Horizontal and vertical centering
   B. Unruled, ruled, and boxed tables
   C. Column headings
   D. Tables contained in letters and reports

III. Manuscripts

  A. Page-line gauge
  B. Single- and multiple-page manuscripts
  C. Manuscript styles
  D. Footnotes
  E. Bibliographies, title pages, and tables of content

IV. Speed and Accuracy

  A. Paragraphs
  B. Numbers
  C. Production

V. Special Problems in Office Typing

  A. Printed forms
  B. Carbon copies
  C. Rough-draft typing
  D. Correction methods
  E. Machine maintenance

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

---

1. Given business letters in unarranged form on a production test, students will be able to produce three mailable letters in 50 minutes.

Subject Matter Content	Learning Activities
Business letters	1. Complete a worksheet from a workbook on parts of a business letter. Check in class. 2. Prepare a bulletin board on business letter styles, punctuation, and placement. 3. Review handout on official two-letter state abbreviations. (Appendix A) 4. Practice typing, folding, and inserting letters into envelopes.

---

2. After a classroom review on tabulation, students will be able to type two tables with correct horizontal and vertical placement in 40 minutes.

Subject Matter Content	Learning Activities
Tabulation	1. Complete activity sheet given in workbook on horizontal and vertical centering.
	2. Type tabulation problems with two and three columns.
	3. Type tabulation problems with column headings in different tabulation styles.
	4. Divide into small groups and evaluate the preceding activities.

---

3. Given a manuscript in rough-draft form, students will be able to complete in class a multiple-page manuscript with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Manuscripts	1. Review the use of a page-line gauge for use in typing a manuscript. (Appendix B)
	2. Type a multiple-page manuscript (with footnotes) given in unarranged form. Use Appendix B.
	3. Compose and type a report using manuscript rules.
	4. Correct copy from Activity 3 using proofreader's marks.
	5. Exchange papers (from Activity 4) with peer and retype from corrected rough draft.

4. Given a five-minute timed writing test, students will be able to demonstrate a 10 percent increase in speed and accuracy on straight-copy material.

Subject Matter Content	Learning Activities
Speed and accuracy	1. Practice for speed by taking ten sprint speed drills on sentences. 2. Type five paragraphs in a foreign language from drill book to increase accuracy. 3. Divide into pairs and proofread paragraphs from Activity 2. 4. Record speed and accuracy levels in notebook to show increases and decreases in speed.

5. Using printed forms, students will be able to type in class the requested information with 100 percent accuracy.

Subject Matter Content	Learning Activities
Printed forms	1. Discuss in small groups what information might be requested on printed forms. 2. Type the requested information on the following forms: W-4, application for a social security number, invoice, purchase order, and memo. 3. Survey local businesses to determine types of forms used and report to the class.

6. In producing mailable copy in class, students will be able to use one correction method effectively.

Subject Matter Content	Learning Activities
Correction methods	1. Survey the market of available correction methods. Have a "Show and Tell Day." 2. Interview secretaries to find out their preferred correction method. Discuss findings in class. 3. In a group discussion, list the advantages and disadvantages of available correction methods.

---

7. Given business letters in arranged form, the students will be able to produce in class two mailable letters and carbon copies with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Carbon copies	1. Divide into groups and choose one of the following activities to demonstrate to the class: a. Steps in assembling a carbon pack using the "Show and Tell" approach. b. Procedure for erasing errors on a carbon copy. c. Corrections using correction fluid, correction tape, and eraser. d. Results of reversing carbon paper. e. Corrections after removing paper from machine. 2. Type two business letters in the following styles with one carbon copy in mailable form: a. Block with open punctuation. b. Modified block with paragraph indentation and mixed punctuation.

---

8. After a classroom demonstration, students will be able to exhibit ability to change a ribbon on a typewriter in three minutes.

Subject Matter Content	Learning Activities
Typewriter maintenance	1. Demonstrate the steps used in changing the ribbon on a typewriter. 2. Practice changing the ribbon. 3. Listen to a repair person discuss preventive typewriter maintenance.

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

* Timed writings on paragraphs
* Timed writings on numbers
* Production test
* Unit test

EQUIPMENT AND SUPPLIES

Student

- Typewriter
- Textbook
- Typing Paper
- Carbon Paper
- Envelopes
- Correction Materials
- Reference Materials
- Printed Forms
- Page-line Gauge
- Worksheet of Letter Parts
- Notebook

Teacher

- Typewriter
- Textbooks and Manuals
- Bulletin Board Materials
- Construction Paper
- Wall Charts
- Office Manuals
- Reference Manuals
- Printed Forms
- Typing Rulers
- Typing Paper
- Carbon Paper
- Envelopes
- Correction Materials
- Paper Cutter
- Typewriter Ribbons

APPENDIX A

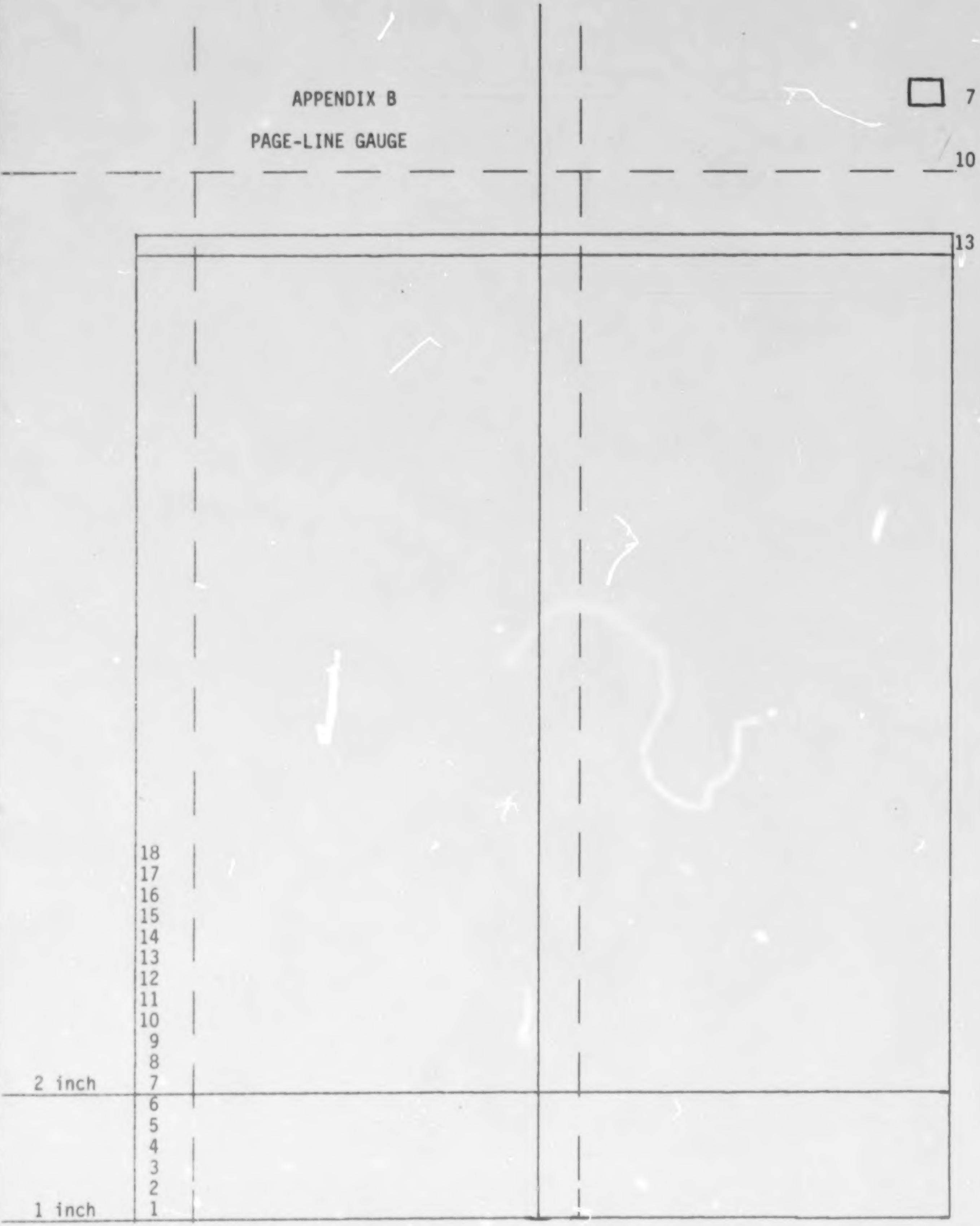
TWO-LETTER STATE ABBREVIATIONS

FOR USE WITH ZIP CODES

Old	New	Old	New
Ala.	AL	Mont.	MT
Alaska	AK	Nebr.	NB
Ariz.	AZ	Nev.	NV
Ark.	AR	N.H.	NH
Calif.	CA	N.J.	NJ
Colo.	CO	N. Mex.	NM
Conn.	CT	N.Y.	NY
Del.	DE	N.C.	NC
D.C.	DC	N. Dak.	ND
Fla.	FL	Ohio	OH
Ga.	GA	Okla.	OK
Hawaii	HI	Oreg.	OR
Idaho	ID	Pa.	PA
Ill.	IL	P.R.	PR
Ind.	IN	R.I.	RI
Iowa	IA	S.C.	SC
Kans.	KS	S. Dak.	SD
Ky.	KY	Tenn.	TN
La.	LA	Tex.	TX
Maine	ME	Utah	UT
Md.	MD	Vt.	VT
Mass.	MA	VA.	VA
Mich.	MI	Wash.	WA
Minn.	MN	W. Va.	WV
Miss.	MS	Wis.	WI
Mo.	MO	Wyo.	WY

APPENDIX B

PAGE-LINE GAUGE


☐ 7
10
13
18
17
16
15
14
13
12
11
10
9
8
2 inch
7
6
5
4
3
2
1 inch
1

SUPPLEMENTARY MATERIALS

Cassettes

Typewriting Drills for Speed and Accuracy
87527-8 (10 cassettes)
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Typewriting Speed/Control Building
T076 (4 cassettes)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Filmstrips with Cassettes

Skill Development--Electric Typewriter
88770-5 (6 filmstrips)
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Textbooks

Century 21 Typewriting
T70 (Complete Course)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Gregg Typing, Series Six
38241-7 (General Course)
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Secretarial Office Procedures
Oliverio and Pasewark, Ninth Edition
K33 (Textbook)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Typing Power Drills
Lloyd, Rowe, and Winger; Second Edition
38171
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Transparencies

Production Transparencies
86313-X (60 transparencies)
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Volume IV--Typewriting Special Applications
T802-4
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Volume III--Typewriting Production
T802-3
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Miscellaneous

Fundamentals of the Research Paper
K105
Kenneth Publishing Company
Box 09074
Chicago, IL 60609

Snow Country Typewriting Practice Set
K01 (Student instruction manual, business forms, and 4 folders for 20 jobs)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Typewriting Speed Chart
X2185
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Typewriting Style Manual
T809
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

RESOURCES

"A Catalog of Performance Objectives, Criterion--Referenced Measures, and Performance Guides for Secretarial, Stenographic, Typing, and Related Occupations." Virginia: Vocational-Technical Education Consortium of States.

Lloyd, Alan C., et al. Gregg Typing, Series Six, Typing 1, General Course. New York: McGraw-Hill Book Company, 1977.

Lloyd, Alan C., et al. Gregg Typing, Series Six, Typing 2, Advanced Course. New York: McGraw-Hill Book Company, 1977.

Lloyd, Alan C., et al. Gregg Typing for Colleges, Complete Course. New York: McGraw-Hill Book Company, 1979.

Mach, K. A., et al. Typewriting; A Mastery Approach. Chicago: Science Research Associates, Inc., 1978.

Moon, Harry C. Typing From Rough Drafts,--Student Projects Book (For Advanced Typewriting). New York: Milady Publishing Corp., 1977.

Wanous, S. J., et al. College Typewriting. Tenth Edition. Cincinnati, Ohio: South-Western Publishing Company, 1980.

UNIT X

SHORTHAND REVIEW

INTRODUCTION

The Department of Labor's Occupational Outlook Handbook for 1978-79 indicates that there are 295,000 projected annual openings from 1976-1985 for secretaries and stenographers. These secretaries and stenographers must be able to produce mailable copy for continued employability and promotability.

This unit offers suggestions to aid students in attaining entry-level skills by reinforcing shorthand theory and building transcription competence with emphasis on proofreading and mailability.

COMPETENCIES

1. Build dictation speed including specialized vocabulary.
2. Develop skills necessary for the production of mailable copy.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Build dictation skills for entry-level positions.
2. Develop ability to produce mailable correspondence from dictation.
3. Demonstrate proofreading ability.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. From a dictated list of words containing all shorthand principles, students will be able to write the shorthand characters and transcribe them with at least 75 percent accuracy.
2. On a dictation test, students will be able to increase their speed by at least ten words a minute.
3. Given dictation at 60-70-80 words per minute, students will be able to transcribe in class two average-length letters in mailable copy form.

4. In a classroom situation, students will be able to contribute at least one example of proper punctuation and capitalization usage for each rule.
5. On a written test, students will be able to identify a list of proofreader's marks with 100 percent accuracy.
6. On a written test, students will be able to locate typographical and subject-matter errors in sentences with 100 percent accuracy.

SUGGESTED INTEREST APPROACHES

1. Have students tape office-style dictation for individual practice.
2. Invite a practicing secretary to talk to the COE class stressing the importance of having a knowledge of shorthand in the world of business.
3. Have the students secure advertisements which indicate the need for shorthand in business.
4. Pretest to determine students' present speed levels.

METHODOLOGY

Because many of the students in a COE class will not have had shorthand, very little can be done as a class towards building shorthand skills. Students can be given pretests to determine the speed at which they are capable of performing. After determining the goal speed for each student, commercially prepared or teacher-made tapes can be used to develop individual speed progress.

For additional practice in proofreading, students could transcribe tapes and complete proofreading drills.

UNIT OUTLINE

SHORTHAND REVIEW

I. Taking Dictation
    A. Reinforcing theory
    B. Building speed
    C. Using specialized vocabulary

II. Transcribing

- A. Building transcription skills
- B. Producing mailable copy
    - 1. punctuation
    - 2. capitalization

III. Proofreading

- A. Reviewing proofreaders' marks
- B. Finding typing errors
- C. Locating subject matter errors

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

---

1. From a dictated list of words containing all shorthand principles, students will be able to write the shorthand characters and transcribe them with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Reinforcing theory	1. Write in shorthand, words and phrases dictated on recorded media. Check outlines with master copy and make corrections. 2. Prepare a bulletin board illustrating brief forms. 3. Write shorthand brief forms from recorded media. Check outlines with master copy and make corrections. 4. Compose letters in shorthand and exchange with peers for reading and writing practice. 5. Write in shorthand from recorded media letters containing medical terminology. Check outlines on master sheet and correct.

2. On a dictation test, students will be able to increase their speed by at least ten words a minute.

Subject Matter Content	Learning Activities
Building speed	1. Practice taking shorthand from speed-building exercises (recorded media) which are ten words per minute above present level. Check shorthand dictionary for questionable outlines. 2. In a small group, practice difficult outlines from chalkboard or overhead transparencies, giving attention to the correct formation of outlines. 3. Read shorthand material from related periodicals for reading practice. 4. Take dictation in shorthand from speeches, news, and songs from radio or television to build speed. Transcribe in class.

---

3. Given dictation at 60-70-80 words per minute, students will be able to transcribe in class two average-length letters in mailable copy form.

Subject Matter Content	Learning Activities
Transcription skills	1. Transcribe articles from business related periodicals and check transcript with key. 2. Transcribe a letter from a peer's notes and have peer check for accuracy. 3. Take dictation in shorthand from speeches, news, and songs from radio or television. Transcribe in class the next day.

Transcription skills	4. Divide into groups and compose two average-length letters. Have teacher dictate letters composed. Transcribe and have each group check letter composed.

4. In a classroom situation, students will be able to contribute at least one example of proper punctuation and capitalization usage for each rule.

Subject Matter Content	Learning Activities
Punctuation and capitalization	1. Place correct punctuation in sentences and write reasons on a practice review sheet. Check with master and make corrections. 2. Write comma rules from memory. Check master list and correct. 3. Write sentences illustrating capitalization rules, omitting capitals. Exchange papers with peers and capitalize sentences, giving reasons. 4. Prepare a bulletin board illustrating rules for and examples of correct usage of commas.

5. On a written test, students will be able to identify a list of proofreader's marks with 100 percent accuracy.

Subject Matter Content	Learning Activities
Proofreader's marks	1. Match proofreader's marks with definitions and make corrections if necessary. (Appendix A) 2. Type from a rough draft drill. Check master sheet for correctness.

Proofreader's marks	3. Use proofreader's marks to correct a business document. Consult answer key.
	4. Prepare a bulletin board illustrating proper uses of proofreader's marks.

---

6. On a written test, students will be able to locate typographical and subject-matter errors in sentences with 100 percent accuracy.

Subject Matter Content	Learning Activities
Subject matter and typographical errors	1. Compare pairs of numbers and names, indicating those which are the same. Check answers with master. (Appendix B)
	2. Prepare a list of the two-letter state abbreviations. Check with master and correct.
	3. Underline the correctly spelled words in list. Check with master. (Appendix C)
	4. Correct errors in the expression of numbers as words or figures. Check answers and correct. (Appendix D)

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

- Dictation tests
- Test on proofreader's marks
- Test on correction of rough draft
- Test on punctuation and capitalization

EQUIPMENT AND SUPPLIES

Student

Textbook
Shorthand Pad
Shorthand Dictionary
Dictionary
Pens (red, black/blue)
Typing Paper
Correction Materials
Carbon Paper
Notebook Paper
Instruction Sheets
Typewriters

Teacher

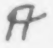
Textbook and Manual
Recorded Media
Recorder
Overhead Projector
Transparencies
Transparency Pens
Bulletin Board Supplies
Specialized Dictionaries
Instruction Sheets

APPENDIX A

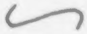
PROOFREADER'S MARKS

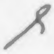
Using the blank provided, match the proofreader's marks with the correct definition. Check answers from master copy.

________ 1. SS

________ 2. 

________ 3. //

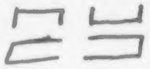
________ 4. 

________ 5. 

________ 6. #

________ 7. DS

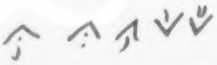
________ 8. Stet or . . .

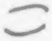
________ 9. 

________10. Cap. or ≡

________11. lc or /

________12. —?

________13. 

________14. 

________15. ⊙

________16. TS

________17. sp

________18. !/

________19. ?/

________20. ∧

a. Transpose letters or words

b. Delete copy

c. Cross out the misstroke and write the correct letter above it.

d. Change copy as indicated

e. Close up horizontal space

f. Insert copy (caret)

g. Insert period

h. Insert question mark

i. Insert exclamation point

j. Insert punctuation mark

k. Insert space

l. Question the writer

m. Use lowercase letters

n. Capitalize single letter or words

o. Add triple space

p. Add double space

q. Close up to single space

r. Let it stand; ignore correction

s. Move copy in the direction of the bracket.

APPENDIX A CONTINUED

__________21. /

__________22. ____ or ital.

__________23. ______

__________24. —

__________25. $=$ / or $\overline{\wedge}$

t. Begin new paragraph; run paragraphs together

u. Underline or italicize

v. Align copy

w. Spell out word or number

x. Cross out word; write as figure

y. insert hyphen

APPENDIX B

PROOFREADING NAMES AND NUMBERS

Proofread the following parts of names and numbers to train yourself to recognize differences in these. If the names and numbers in both columns are exactly the same, place a check in the blank.

1.	James A. O'Donnell	James A. Odonnell	1.	___
2.	Miss Donna Iver	Miss Donna Ivers	2.	___
3.	Alice C. Freidman	Alice G. Greidman	3.	___
4.	Ms. Alice W. Hunter	Ms. Alice W. Hunter	4.	___
5.	Dr. Paul M. Hebert	Dr. Paul M. Herbert	5.	___
6.	Issac C. Dooms	Isac C. Dooms	6.	___
7.	John A. Robichaux	John R. Robichaux	7.	___
8.	Mrs. Amy Jane Smythe	Mrs. Amy June Smythe	8.	___
9.	Harry Paul Witherspoon	Harry Paul Witherspoon	9.	___
10.	Johnny Appel Jones	Johnny Appell Jones	10.	___
11.	(504) 616-5617	(504) 616-5617	11.	___
12.	(704) 318-3189	(704) 318-3188	12.	___
13.	$560.000.90	$560,000.90	13.	___
14.	0.09 gram	0.09 gram	14.	___
15.	1981-1982	1981-1982	15.	___
16.	2-28-82	2-26-82	16.	___
17.	1,345,989,090	1,345,988,090	17.	___
18.	9:08 a.m.	9:08 a.m.	18.	___
19.	Hotel Room 1927	Hotel Room 1297	19.	___
20.	12.98756	1.298756	20.	___
21.	1923 Byron Street	1933 Byron Street	21.	___
22.	2/10, n/30	2/10, n/30	22.	___

APPENDIX C

SPELLING CHECKLIST

Underline the correctly spelled word in the lists.

1.	acurate	accurate
2.	circulars	circulers
3.	underlinning	underlining
4.	transmitted	transmited
5.	seperate	separate
6.	transfereing	transfering
7.	vocabulery	vocabulary
8.	unnecessary	unecessary
9.	garantee	guarantee
10.	goverment	government
11.	hiting	hitting
12.	merryly	merrily
13.	heartly	heartily
14.	fiting	fitting
15.	manageable	managable
16.	happyness	happiness
17.	preventible	preventable
18.	planing	planning
19.	chargeing	charging
20.	flying	fling
21.	useable	usable
22.	lovable	loveable
23.	procedeure	procedure
24.	clerecal	clerical
25.	effectivly	effectively

APPENDIX D

EXPRESSION OF NUMBERS

Directions: If the sentence is correct, mark "C" before it; if it is incorrect, mark "X" and underline the error.

_____ 1. The memorandum is dated May 5th, not May 6th.

_____ 2. There are 500 pens in the box.

_____ 3. Is the price on the pen 75¢?

_____ 4. Forty pencils were taken from the stockroom.

_____ 5. Do you always begin school at eight o'clock?

_____ 6. At the age of 25, John completed his schooling.

_____ 7. He lives at 1 Park Place.

_____ 8. The celebration will take place on the 11th of June.

_____ 9. The correct price for the fan is $198.00

_____10. The item now costs 5 cents rather than 3 cents.

_____11. The man ordered ten 3-pound bags of cement.

_____12. Please write gift certificates in the amounts of $5, 10 and 15.

_____13. In 1982 the company added 22,000 subscribers to their list.

_____14. Living costs increased 20 to 30 percent.

_____15. Nicole is four pounds heavier than Lauri.

_____16. The can weighs 5 pounds 3 ounces.

_____17. We found 2 of the four children hiding.

_____18. 15 pairs of skates were on the shelf.

_____19. We appreciate your order of July 10.

_____20. Her order was for 220 five-foot boards.

ANSWER KEY

APPENDICES A, B, C, AND D

APPENDIX A

1. Q
2. T
3. V
4. A
5. B
6. K
7. P
8. R
9. S
10. N
11. M
12. L
13. J
14. E
15. G
16. O
17. W
18. I
19. H
20. F
21. C
22. U
23. X
24. D
25. Y

APPENDIX B
(Numbers that are the same.)

4
9
11
13
14
15
18
22

APPENDIX C

1. accurate
2. circulars
3. underlining
4. transmitted
5. separate
6. transfering
7. vocabulary
8. unnecessary
9. guarantee
10. government
11. hitting
12. merrily
13. heartily
14. fitting
15. manageable
16. happiness
17. preventable
18. planning
19. charging
20. flying
21. usable
22. lovable
23. procedure
24. clerical
25. effectively

APPENDIX D

1. X, th, th
2. C
3. X, ¢
4. C
5. C
6. X, 25
7. X, 1
8. C
9. X, 00
10. C
11. C
12. X, 10, 15
13. C
14. C
15. X, four
16. C
17. X, 2
18. X, 15
19. C
20. C

SUPPLEMENTARY MATERIALS

Cassettes

Business Letter Tapes for Dictation and Transcription
87320.8 (10 cassettes)
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Century 21 Shorthand: Advanced Dictation/Transcription
R124 (36 cassettes)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Century 21 Shorthand: Intensive Dictation/Transcription
R114 (26 cassettes)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Century 21 Shorthand: Theory and Practice
R104 (20 cassettes)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Corporate Giants Dictate
MCP-9 (10 one-hour cassettes, case)
Dictation Disc Company
240 Madison Avenue
New York, NY 10016

DDC Student Homework Cassettes
S-8, Set 480 (brief forms, 40-80 wpm)
S-9, Set 482 (theory review, 60-90 wpm)
Dictation Disc Company
240 Madison Avenue
New York, NY 10016

Gregg Shorthand Speed Development Tape Library
87100.0 (Cassette)
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Cassettes continued

Individual Progress Method, Series 90 (1PM/2)
87952.4 Channel B
87953.2 Channel C
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Legal Dictation
MTL-10 (10 cassettes, book, case)
Dictation Disc Company
240 Madison Avenue
New York, NY 10016

The Legal Secretary
Y66Y666 (Office Job Simulation, Dictation/Transcription Cassette)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

The Medical Secretary--Northside Medical
Y67Y676 (Office Job Simulation, Dictation/Transcription Cassette)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Pyramided Business Letter Dictation
BLD-I (9 cassette set, 50-80 wpm)
BLD-II (9 cassette set, 80-110 wpm)
Dictation Disc Company
240 Madison Avenue
New York, NY 10016

The Secretary, Executive Offices of America
Y65-Y656 (Office Job Simulation, Dictation/Transcription Cassette)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Shorthand Speed Sprint Drills
SSSD-CB (8 cassette set)
Dictation Disc Company
240 Madison Avenue
New York, NY 10016

Cassettes continued

32 Speed-Building Cassettes
C200 (32 one-hour cassettes, case, key)
Dictation Disc Company
240 Madison Avenue
New York, NY 10016

Textbooks

Century 21 Shorthand: Advanced Dictation/Transcription
R12
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Century 21 Shorthand Dictionary
R14
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Century 21 Shorthand Legal Dictionary
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Gregg Shorthand Dictionary, Series 90
24481-2
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Speed Dictation with Previews in Gregg Shorthand, Series 90
73045-8
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Transparencies

Gregg Shorthand Transparencies, Series 90
86642.2 Transcription/Punctuation (48 transparencies)
86643.0 Transcription/Typing Style (48 transparencies)
86644.9 Transcription/Spelling (48 transparencies)
Gregg McGraw Hill Book Company
P. O. Box 996
Norcross, GA 30091

Techniques of Machine Transcription
GV116T (10 transparencies)
Career Aids, Inc.
8950 Lurline Avenue, Dept. T7
Chatsworth, CA 91311

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RESOURCES

Camp, Sue C. Developing Proofreading Skill. Gregg McGraw-Hill Book Company, 1980.

Crank, Doris H. and Willie Oranda Pyke. "Suggested Strategies for Teaching Shorthand, Developing Shorthand Theory and Reading Skills (Part 1)." Business Education World, Vol. 60/No. 1, September-October, 1979, pp. 3-4.

Crank, Doris H. and Willie Oranda Pyke. "Suggested Strategies for Teaching Shorthand, Transcription Skills (Part 3)." Business Education World, Vol. 60/No. 3, January-February, 1980, pp. 18-19.

Dry, Samuel W. and Nellie E. Dry. Teaching Gregg Shorthand and Transcription. Portland: J. Weston Walch, Publisher, 1969.

Jones, Ellis J. and David H. Kane. Proofreading Precision. South-Western Publishing Company, 1982.

Leslie, Zoubek, Lemaster, Strony. Instructor's Handbook for Gregg Dictation and Introductory Transcription. Gregg McGraw-Hill Book Company, 1978.

Motivation Manual, a How-to Approach. Gregg McGraw-Hill Book Company, 1979, p. 4.

Stewart, Lanham, and Zimmer. Business English and Communication. Gregg McGraw-Hill Book Company, 1978. Fifth Edition.

UNIT XI

OFFICE PROCEDURES REVIEW

INTRODUCTION

A unit in general office procedures can cover many topics. Because a secretary has so many varied activities, this unit has been designed to review some of those not covered in other units in this curriculum guide. Some of the subject matter to be covered include office manners, the work station, mail processing, travel plans, and meeting procedures.

Students will have opportunities to contact local businesses for assistance in completing some of the activities.

COMPETENCIES

1. Examine the knowledge and skills necessary for successful performance in the office.
2. Develop proficiency in handling procedures for mail, shipping, travel, meetings, and conferences.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Recognize the importance of the duties of a secretary.
2. Demonstrate efficient handling of mail and shipping services.
3. Apply correct procedures in handling travel.
4. Exhibit the ability to help in planning and conducting meetings and conferences.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. On a written test, students will be able to identify and describe at least five duties of a secretary.
2. Given a list of five situations involving office visitors and telephone calls, students will be able to write (on a test) acceptable ways of handling these persons with at least 75 percent accuracy.

3. Given five pieces of incoming and outgoing mail on a test, students will be able to employ proper procedures for handling mail with at least 75 percent accuracy.

4. On a written test, students will be able to list and describe the function of at least three pieces of equipment used in processing mail.

5. Given shipping and mailing instructions, students will be able to select the appropriate method for sending various materials with at least 75 percent accuracy.

6. As an individual project, students will be able to make all arrangements for a business trip, including travel to and from a given destination, accommodations, appointments, itinerary, expense report, and follow-up tasks. A checklist will be used to evaluate student performance.

7. Given a list of duties to be performed in successfully conducting a meeting, students will be able to rank the duties in the order to be completed and describe on a written test the work associated with each duty with at least 75 percent accuracy.

8. In a written report, students will be able to explain the steps involved in holding a successful conference. A checklist will be used to evaluate the report.

SUGGESTED INTEREST APPROACHES

1. Invite postal employees, secretaries, and travel agents to speak on mail regulations, public relations, and travel.

2. Visit the mail room of a large company.

3. Interview a secretary or other office employee on office manners.

4. Contact office supply stores for brochures and information on mailing equipment.

5. Attend meetings of civic or public organizations to observe parliamentary procedure and the duties of the secretary.

METHODOLOGY

This unit contains various simulation activities relating to the business community. Class discussion and teacher lecture will be used to present content material from the textbook or other resources available to the instructor.

UNIT OUTLINE

OFFICE PROCEDURES REVIEW

I. Managing the Office

   A. Responsibilities
      1. Routine duties
      2. Assigned tasks
      3. Supervision
      4. Public relations
   B. Work station
      1. Equipment
      2. Supplies
      3. Decorations
      4. Maintenance

II. Mail and Shipping Services

   A. Mail
      1. Incoming mail
      2. Outgoing mail
      3. Volume mail
      4. Equipment
      5. Special services
   B. Shipping
      1. United Parcel Service
      2. Express service
      3. Freight

III. Travel

   A. Arrangements
      1. Domestic
         a. Air
         b. Bus
         c. Car
         d. Rail
         e. Ship
      2. International
         a. Passport
         b. Visa
         c. Immunization
   B. Itinerary
   C. Expense report
   D. Follow-up

IV. Meetings and Conferences

  A. Meetings
    1. Pre-arrangements
      a. Reservations
      b. Notices
      c. Agenda
    2. Meeting procedures
      a. Parliamentary procedure
      b. Notes
    3. Post-meeting duties
      a. Minutes
      b. Other
  B. Conferences
    1. Registration
    2. Speakers
    3. Publicity
    4. Social

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

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1. On a written test, students will be able to identify and describe at least five duties of a secretary.

Subject Matter Content	Learning Activities
Managing the office	1. Divide into groups and list duties of a secretary. Consolidate the group lists into one class list and discuss. 2. Categorize the duties from Activity 1 as "routine," "assigned," "supervisory," or "public relations." 3. Visit a business office and interview the secretary to determine how an attractive work station is maintained and what equipment and supplies are most commonly used. Prepare a class list of the findings.

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2. Given a list of five situations involving office visitors and telephone calls, students will be able to write (on a test) acceptable ways of handling these persons with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Public relations	1. Listen to a guest speaker (secretary, office manager, or executive) explain guidelines for handling office visitors. Type a list of the guidelines presented. 2. Write a situation that might occur in an office involving a difficult visitor. 3. Select a partner and choose one event from Activity 2 to role play. 4. Choose another event and partners will switch roles. 5. Evaluate the secretary's handling of the situation. (Appendix A) 6. View a film or filmstrip on office manners. (See Supplementary Materials for suggestions.) Discuss film in class.

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3. Given five pieces of incoming and outgoing mail on a test, students will be able to employ proper procedures for handling mail with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Mail--incoming, outgoing, volume	1. Process incoming mail by opening, dating, sorting, and distributing. Check for accuracy. 2. Process outgoing mail by inserting into envelopes, weighing, affixing postage, and sorting. Check for accuracy.

3. Use a Zip Code Directory to find the correct ZIP code for various addresses. Check for accuracy.

4. Visit the mail room of a large company to observe steps in handling the mail.

5. In groups, compose a short report, summarizing the steps you observed in Activity 5. Have a member of the group type the report and post it in the classroom.

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4. On a written test, students will be able to list and describe the function of at least three pieces of equipment used in processing mail.

Subject Matter Content	Learning Activities
Mail--equipment	1. Set up a model desk to be used in processing mail. Make a list of supplies and equipment needed. 2. Choose one of the following pieces of mail equipment: a. postage meter b. scale c. mail opener d. time and date recorder e. folding and inserting equipment f. electronic ZIP code sorter g. sorting racks Contact office supply stores to obtain information on functions, cost, maintenance, and other information available. 3. Use information from Activity 2. Compare brands and recommend one to purchase. Defend your choice in class.

Mail--equipment	4. Contact the postal service or have a post office employee speak to the class on current postage rates for different classes of mail. Make a chart (poster) to display in the classroom. 5. Prepare a bulletin board with brochures on mail equipment.

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5. Given shipping and mailing instructions, students will be able to select the appropriate method for sending various materials with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Mail--special services and shipping	1. Prepare in groups a crossword puzzle using terminology related to special mailing services and shipping methods. 2. Call or visit a representative of an express service or freight company to obtain information concerning rates and services available. Present your findings to the class. 3. Prepare special mail or other packages for mailing or shipping. Share with class. 4. Type an outgoing mail schedule from your city and post on the bulletin board.

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6. As an individual project, students will be able to make all arrangements for a business trip, including travel to and from a given destination, accommodations, appointments, itinerary, expense report, and follow-up tasks. A checklist will be used to evaluate student performance.

Subject Matter Content	Learning Activities
Travel	1. Visit a travel agency to learn what services can be provided. Prepare a bulletin board showing these services.

Travel

2. Find a sample itinerary in a typing book or other textbook and type a copy of it, paying close attention to proper form.

3. Choose a city at least 200 miles from your own and compare the cost and convenience of travel by air, bus, car, rail, and ship (if applicable). Then choose a city less than 200 miles from your own. Make a table showing the comparative cost of each mode of transportation. Choose the mode you feel is most economical and support your choice in class.

4. Write to the proper government agencies for information on passports, visas, and inoculations needed for international travel. Present your findings to the class.

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7. Given a list of duties to be performed in successfully conducting a meeting, students will be able to rank the duties in the order to be completed and describe on a written test the work associated with each duty with at least 75 percent accuracy.

Subject Matter Content | Learning Activities

Meetings

1. Follow parliamentary procedure in conducting a mock meeting involving all class members.

2. Volunteer to act as secretary for a meeting of a school organization. Be sure to perform all pre- and post-meeting duties as well as meeting procedures. Report your experiences to the class.

3. Type the minutes from Activity 2 and submit to your teacher.

4. Observe the secretary at the next meeting you attend. Note his/her actions during the course of the meeting. Report observations to class.

---

8. In a written report, students will be able to explain the steps involved in holding a successful conference. A checklist will be used to evaluate the report.

Subject Matter Content	Learning Activities
Conferences	1. Compose and type a letter inviting a prospective guest speaker to a conference. Check for correctness. 2. Prepare a registration form to be sent to persons to attend your conference. Be sure to include space for all necessary information such as room reservation, meals (banquets), arrival and departure dates, etc. Discuss with class. 3. Write a short paragraph to make the conference sound as appealing as possible. Present to class. 4. Investigate places of interest in your town or area which you may recommend to visitors attending the conference. Type your recommendations in attractive form and place on bulletin board.

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

- Unit test
- Individual projects
- Written reports

EQUIPMENT AND SUPPLIES

Student	Teacher
Textbook	Textbook and Manual
Notebook	Rating Sheets
Rating Sheets	Bulletin Board Materials
Typing Supplies	Mail Processing Supplies
Poster Paper	Robert's Rules of Order
Typewriter	Filmstrip Projector
Pens	Film Projector
Pencils	Film/Filmstrips

APPENDIX A

HANDLING VISITORS

Use this form to rate the secretary's performance. Place a check mark in the appropriate column.

	Acceptable	Unacceptable
Greeting		
Courtesy/Tact		
Helpfulness		
Vocabulary		
Tone of Voice		
Decision Making		

APPENDIX B

CHECKLIST FOR TRAVEL ARRANGEMENTS

_____ Convenient mode of transportation

_____ Suitable accommodations

_____ Appointments timely scheduled

Reports typed:

- _____ in acceptable format
- _____ with no uncorrected typographical errors

Project contains:

- _____ complete information
- _____ logical arrangement of material
- _____ correct grammar
- _____ correct punctuation

Overall project is _____ acceptable _____ unacceptable.

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APPENDIX C

CHECKLIST FOR HOLDING A CONFERENCE

Steps include:

____ securing speakers

____ mailing publicity to prospective participants

____ preparing menus

____ planning social activities

____ reserving the meeting rooms

____ receiving registrations by mail

____ publicizing the conference

____ obtaining biographical material from speakers

____ securing necessary equipment

____ setting up registration

____ preparing notices to direct participants to meeting rooms

____ typing the program

____ sending thank-you notes

____ sending follow-up reports, letters

____ making an evaluation of the conference

Overall report is ____ acceptable ____ unacceptable.

SUPPLEMENTARY MATERIALS

Activity Packs

Office Practice Activities
03-2418-B5 (50 spirit masters)
J. Weston Walch, Publisher
Box 658
Portland, ME 04104-0658

Recording Secretary Activity Pack
09-2424-B5 (1 cassette, 14 visual masters, 16 spirit masters, 1 teacher guide)
J. Weston Walch, Publisher
Box 658
Portland, ME 04104-0658

Books

Reference Manual for Office Personnel
Sixth Edition
K45 (Reference Manual)
K451 (Study Guides)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Cassettes

Office Simulation--Dictation/Transcription Cassette
Y656 (1 cassette)
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Films

Basic Job Skills: Dealing with Customers
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

Ben Franklin, Here!
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

Help Wanted: Secretary
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

How to Conduct a Meeting
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

How to Run a "Better" Mail Room
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

Mail it Right!
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

More and Louder
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

Office Practice: Manners and Customs
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

Parliamentary Procedure in Action
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

Secretary: A Normal Day
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

Story of the U.S. Mail
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

Filmstrips

Dealing with People
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

The Executive Secretary
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

Helping Your Boss Get More Done
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

Just a Secretary
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

Mail Processing: The Ins and Outs
RM6005 (1 filmstrip, 1 cassette, and teacher guide)
Career Aids, Inc.
8950 Lurline Avenue
Dept. K45
Chatsworth, CA 91311

Working World of the Secretary
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

Your Parliamentary Partner: Mr. Main Motion
Business Education Films
7820 20th Avenue
Brooklyn, NY 11214

Simulations

Pinetree Fashions
Y52
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

The Secretary, Executive Offices of America
Y65
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Slides

Daily Office Procedures
04-2305-B5 (22 35mm slides)
05-2306-B5 (1 cassette)
J. Weston Walch, Publisher
Box 658
Portland, ME 04104-0658

Processing Incoming and Outgoing Mail
MI1355 (35 slides, 1 cassette, teacher guide)
Career Aids, Inc.
8950 Lurline Avenue
Dept. K45
Chatsworth, CA 91311

RESOURCES

Church, Olive D. and Anne E. Schatz. Office Systems and Careers. Boston: Allyn and Bacon, Inc., 1981.

Hanna, J. Marshall, et al. Secretarial Procedures and Administration, 7th edition. Cincinnati: South-Western Publishing Company, 1978.

Jennings, Lucy Mae. Secretarial and Administrative Procedures. Englewood Cliffs, NJ: Prentice-Hall, Inc., 1978.

Leaming, Marj P. and Robert J. Motley. Administrative Office Management--A Practical Approach. Dubuque, Iowa: Wm. C. Brown Company Publishers, 1979.

Moon, Harry R. Office Procedures Teachers' Manual. Bronx, NY: Milady Publishing Company, 1981.

Oliverio, Mary Ellen and William R. Pasework. Secretarial Office Procedures, 9th edition. Cincinnati: South-Western Publishing Company, 1977.

Pasework, William R. and Mary Ellen Oliverio. Clerical Office Procedures, 6th edition. Cincinnati: South-Western Publishing Company, 1978.

Stewart, Jeffrey R., Jr., et al. Office Procedures. New York: McGraw-Hill Book Company, 1980.

UNIT XII

SPECIALIZED OFFICE PROBLEMS

BANKING

INTRODUCTION

This unit is designed to review the background information on the various services of banks. It will also serve as an aid to the students in the development of competencies that are necessary to perform banking tasks.

COMPETENCY

Demonstrate the ability to communicate information accurately and to apply appropriate skills to complete the assigned tasks.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Demonstrate the ability to use banking terms.
2. Exhibit the ability to arrange tasks in a bank in order of priority.
3. Develop skills necessary to perform banking tasks.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. Given background information, students will be able to define banking terms on a written test with at least 75 percent accuracy.
2. Given a schedule of daily activities in class, students will be able to arrange their tasks in the order of priority with at least 75 percent accuracy.
3. Given necessary information, students will be able to compose and type letters, memorandums, and reports in class with at least 75 percent accuracy.

4. Given necessary information in class, students will be able to complete banking forms with at least 75 percent accuracy.

5. Given a production test, students will be able to complete the tasks assigned within a given period of time with at least 75 percent accuracy.

SUGGESTED INTEREST APPROACHES

1. Give a pretest to determine the students' understanding of bank services.

2. Visit a local bank to learn of services to community and the equipment used and make report to class. (Could be done in small groups.)

3. Invite a representative from the bank to speak to the class on employer expectations regarding beginning employees.

4. Collect free materials from banks to use as bulletin board displays.

METHODOLOGY

This unit is designed for independent study; however, it does provide for some group activities. Teacher lecture will also be used to reinforce the student activities.

UNIT OUTLINE

BANKING

I. Review Background Information (See--Financial Records Unit)

    A. Bank Services
        1. Checking account
        2. Savings account
        3. Loans
        4. Investments
        5. Safety deposit
        6. Trust
        7. Consumer services

B. Terminology
  1. Bank
  2. Check
  3. ABA transit number
  4. Non-sufficient funds (NSF)
  5. Passbook
  6. Deposit ticket
  7. Forged check
  8. Check protector
  9. Bank statement
  10. Raised check
  11. Endorsement
  12. Bank draft
  13. Stop payment

II. Skills and Tasks

A. Determine priorities and make decisions
B. Compose and type letters, memorandums, and reports
C. File banking documents and correspondence
D. Complete bank forms used by employees
  1. Teller's slips
  2. New account forms
  3. Deposit tickets--checking and savings accounts
  4. Checks
  5. Savings withdrawal request forms
  6. Transfer of funds forms
  7. Cash in and out forms
  8. Stop payment request forms

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

---

1. Given background information, students will be able to define banking terms on a written test with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Background information	1. Compile a list of banking terms and present the list to the class.
	2. Compose sentences using the banking terms from Activity 1.
	3. Prepare a bulletin board using banking terms.
	4. Complete the Scrambled Word Exercise reviewing banking terms. (Appendix A)

2. Given a schedule of daily activities in class, students will be able to arrange their tasks in the order of priority with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Setting priorities	1. Interview various workers in a bank and present to the class a list of tasks performed by each.
	2. Discuss in small groups the lists composed in Activity 1 and arrange tasks in order of priority.
	3. Present to class the new list worked out in Activity 2.

3. Given necessary information, students will be able to compose and type letters, memorandums, and reports in class with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Skill improvement	1. Collect various styles of business letters to show examples of proper and improper styles.
	2. Prepare bulletin board display showing various letter styles. Type any styles not collected in Activity 1 and use these also in the bulletin board display.
	3. Compose and type letters, memorandums, and reports from problem situations given by the teacher in rough draft form.

4. Given necessary information in class, students will be able to complete banking forms with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Skill development and improvement	1. Collect forms used in banks and present them to the class. 2. Complete banking forms using problems furnished by the teacher. 3. Visit bank or listen to a presentation given by a bank representative on the employee's use of banking forms. 4. Prepare a bulletin board or poster display of banking forms.

---

5. Given a production test, students will be able to complete the tasks assigned within a given period of time with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Skill improvement	1. Take timed drills on completing banking forms supplied by teacher. 2. Write a report on the importance of speed and accuracy in performing banking tasks. 3. Type a simulated banking project provided by teacher.

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

- Unit test
- Class participation grade
- Student project grade
- Group project grade

EQUIPMENT AND SUPPLIES

Student

- Textbook
- Notebook
- Instruction Sheets
- Letterheads
- Onion Skin Paper
- Plain White Paper
- Carbon Paper
- Banking Forms
  - Teller's slips
  - Deposit tickets--checking and savings accounts
  - New account forms--checking and savings accounts
  - Cash in and out forms
  - Transfer of funds slips
  - Stop payment request forms
  - Checks
  - Savings withdrawal request forms
- Typewriter
- Calculator/Adding Machine
- Bulletin Board Supplies
- Pens
- Pencils

Teacher

- Textbook and Manual
- Transparencies
- Overhead Projector
- Bulletin Board Supplies
- Filmstrips
- Filmstrip Projector
- Cassette Player
- Duplicator
- Pen
- Pencil

APPENDIX A

BANKING TERMINOLOGY

SCRAMBLED WORDS

Directions: Unscramble the words and place them in the blank provided.

1. HECCK 1. ____________________
2. KOPSAOBS 2. ____________________
3. TEPDOSI CITTEK 3. ____________________
4. RGFEDO KEHCC 4. ____________________
5. CECHK RETTOPROC 5. ____________________
6. NKAB TATSENMET 6. ____________________
7. AKBN FATRD 7. ____________________
8. POTS TAPYNME 8. ____________________
9. TESRENDEMON 9. ____________________
10. BAA RATNITS NUBMRE 10. ____________________
11. SIREDA KHCEC 11. ____________________
12. KNAB 12. ____________________

Answers: 1. check 2. passbook 3. deposit ticket 4. forged check
5. check protector 6. bank statement 7. bank draft
8. stop payment 9. endorsement 10. ABA Transit number
11. raised check 12. bank

SUPPLEMENTARY MATERIALS

Filmstrips

The How and Why of Banking Series
Young Executives Section
Louisiana Bankers Association
P. O. Box 2871
Baton Rouge, LA 70821

Textbooks

Math for Business Careers
ISBN: 0-07-031121-8, 1975
Gregg & Community College Division
McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Secretarial Office Procedures
ISBN: 0-538-11320-0, 1972
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Workbook

The How and Why of Banking
Young Executives Section
Louisiana Bankers Association
P. O. Box 2871
Baton Rouge, LA 70821

RESOURCES

Huffman, Harry, et al., Math for Business Careers. New York: McGraw-Hill Book Company, 1975.

Moon, Harry R., Office Procedures. Bronx, NY: Educational Publishers, 1981.

Warmke, Roman and Eugene Wyllie, Consumer Economic Problems. Cincinnati: South-Western Publishing Company, 1977.

The How and Why of Banking. A Teaching Guide. Baton Rouge: Young Executives Section, Louisiana Bankers Association, 1982.

UNIT XII

SPECIALIZED OFFICE PROBLEMS

INSURANCE OFFICE

INTRODUCTION

It is essential that today's students be given opportunities to relate their business education skills and know-how to realistic experiences in the classroom. Therefore, this unit is designed to provide the students with tasks performed by an insurance clerk.

COMPETENCIES

1. Demonstrate the ability to communicate accurately information relating to insurance.
2. Demonstrate the ability to apply appropriate skills to complete assigned insurance tasks.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Demonstrate the ability to use insurance terms.
2. Exhibit the ability to arrange tasks in an insurance office in the order of priority.
3. Develop skills necessary to perform insurance tasks with speed and accuracy.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. Given background information, students will be able to define insurance terms on a written test with at least 75 percent accuracy.
2. Given an unarranged schedule of each day's activities in class, students will be able to arrange their work schedule with at least 75 percent accuracy.

3. Given background information, students will be able to compose and type letters, accident reports, and premium invoices in class with 100 percent accuracy.

4. Given background information, students will be able to complete insurance forms in class with 100 percent accuracy.

SUGGESTED INTEREST APPROACHES

1. Give a pretest to determine the students' understanding of insurance terminology and the types of insurance coverages available.

2. Visit local insurance agency to help students see the many facets of the insurance business.

3. Invite an insurance agent to speak to the class on skills expected by employers of beginning employees in an insurance office.

4. Small group of students will visit an insurance office and make a report to the class.

METHODOLOGY

This unit is basically designed for independent study. However, it does provide for some group activities to further aid students in the development of their skills. Teacher lectures will also be used to reinforce student activities.

UNIT OUTLINE

INSURANCE OFFICE

I. Background Information

    A. Types of insurance coverages
        1. life insurance
            a. whole life (also known as straight life and permanent life)
            b. term life
            c. endowment life
            d. limited-payment life
        2. health and accident insurance
        3. hospitalization insurance
        4. workmen's compensation

      5. property insurance
         a. fire and extended coverage
         b. theft or burglary
         c. wind damage
         d. earthquake
         e. fidelity
         f. comprehensive liability
      6. automobile insurance
         a. comprehensive
         b. collision
         c. bodily injury
         d. property damage
         e. medical payments
         f. uninsured motorist
         g. no-fault insurance
   B. Terminology
      1. insurance
      2. policy
      3. premium
      4. endorsement
      5. deductible
      6. appraisal
      7. policy period
      8. claim
      9. lapse
      10. economic risk
      11. policyholder

II. Skills and Tasks

   A. Determine priorities and make decisions
   B. Compose and type letters and accident reports
   C. Type documents, memorandums, notices, premium invoices, changes in coverage (endorsement requests), voucher checks, index and ID cards from rough draft copies
   D. Compute premiums
      1. vehicle
      2. homeowners
   E. File and retrieve insurance documents
   F. Complete insurance forms
      1. accident statements
      2. memo forms
      3. voucher checks
      4. notices
      5. worksheets

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

1. Given background information, students will be able to define insurance terms on a written test with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Background information	1. Write sentences using insurance terms.
	2. Match words with a list of definitions. (Appendix A)
	3. Prepare bulletin board using insurance terms.

2. Given an unarranged schedule of each day's activities in class, students will be able to arrange their work schedule with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Setting priorities	1. Interview a secretary in an insurance office and make a list of tasks performed.
	2. Discuss in small groups the list of tasks in Activity 1 and arrange the list in order of priority.
	3. Present to class the list from Activity 2.
	4. Prepare a bulletin board using tasks in an insurance office.

3. Given background information, students will be able to compose and type letters, accident reports, and premium invoices in class with 100 percent accuracy.

Subject Matter Content	Learning Activities
Skill improvement	1. Compose and type letters, accident reports, and premium invoices from problems given by the teacher. 2. Compose and type a report on a dramatization of an accident presented in class or after viewing film of an accident. 3. Present the various versions of the accident to the class. 4. Prepare and type the premium invoices for several automobiles and homes. Use charts obtained from an insurance office. 5. Discuss in small groups the importance of speed and accuracy in completing tasks in an insurance office. Present findings to class.

---

4. Given background information, students will be able to complete insurance forms in class with 100 percent accuracy.

Subject Matter Content	Learning Activities
Skill development and improvement	1. Collect forms used in insurance offices and prepare a bulletin board display. 2. Visit insurance office or listen to a presentation given by a representative from an insurance office. Examine hand-out materials, and participate in related activities. 3. Add forms obtained in Activity 2 to the bulletin board display, if samples are not posted. 4. Complete insurance forms using information in problems supplied by teacher.

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

- Unit test
- Quiz at end of each section on background information
- Class participation
- Projects

EQUIPMENT AND SUPPLIES

Student

Textbook
Notebook
Instruction Sheets
Office Manuals
Typewriter
Calculator/Adding Machine
Letterheads
Onion Skin Paper
Plain White Paper
Memorandum Forms
Accident Report Forms
Voucher Checks
Notice of Cancellation Forms
Endorsement Request Forms
Envelopes
Vehicle Rating Work Sheets
10-Day Reminder Notices
Index Cards and ID Cards
Premium Invoices (Vehicle and Homeowners)
Folders
Pencils
Pens

Teacher

Textbook and Manual
Bulletin Board Supplies
Office Manuals
Overhead Projector
Transparencies and Supplies
Folders
Filmstrip
Filmstrip Projector
Pen
Pencil

APPENDIX A

INSURANCE TERMINOLOGY

Directions: Write in the blanks the terms from column 2 that match the statements in column 1.

Column 1

______ 1. A modification or change in coverage after the issuance of the insurance policy.

______ 2. An unexpected event such as a collision.

______ 3. The part of the insurance claim for which the policyholder is responsible.

______ 4. The expiration of the policy.

______ 5. A common means of sharing risks.

______ 6. One who carries insurance.

______ 7. The amount paid for insurance.

______ 8. A contract between one who buys insurance and the insurance company.

______ 9. A demand by an individual for compensation from an insurance company.

______ 10. An estimate of the value of property.

Column 2

Economic risk

Insurance

Policy

Premium

Endorsement

Deductible

Comprehensive

Policy period

Claim

Lapse

Policyholder

Renewal

Accident

Depreciation

Appraisal

APPENDIX A

INSURANCE TERMINOLOGY

ANSWER KEY

1. Endorsement
2. Accident
3. Deductible
4. Lapse
5. Insurance
6. Policyholder
7. Premium
8. Policy
9. Claim
10. Appraisal

SUPPLEMENTARY MATERIALS

Film/Filmstrip

The Secretary--A Normal Day
(16 mm, 11 minutes, color)
Louisiana Dept. of Education
Vocational Education Materials Center Library
P. O. Box 44064
Baton Rouge, LA 70804

Write to: Institute of Life Insurance, Educational Division, 277 Park Avenue, New York, NY 10017 for catalog of titles of filmstrips and films.

Textbooks

Applied Business Mathematics
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

General Business for Everyday Living
ISBN: 07-050800-3, 1972
Gregg Division
McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Reference Manual for Office Employees
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Reference Manual for Stenographers and Typists
McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Skill for Consumer Success
ISBN: 0-538-08100-7, 1981
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Word Division Manual
Second Edition, 1970
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Simulation

The Insurance Clerk--An Office Simulation
ISBN: 0-538-25610-9, 1981
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

RESOURCES

Huffman, Harry, et al., Math for Business Careers. New York: McGraw-Hill Book Company, 1975.

Moon, Harry R., Office Procedures. Bronx, NY: Educational Publishers, 1981.

Morrison, Phyllis, The Business Office. New York: McGraw-Hill Book Company, 1978.

Warmke, Roman and Eugene Wyllie, Consumer Economic Problems. Dallas: South-Western Publishing Company, 1977

UNIT XII

SPECIALIZED OFFICE PROBLEMS

LEGAL OFFICE

INTRODUCTION

For students seeking a career in the legal profession, provisions must be made to promote their interest and also improve their specialized skills in their chosen area of concentration. The COE student must possess basic skills along with some knowledge of related skills. This unit will focus on the special skills needed to function efficiently in the legal office.

COMPETENCIES

1. Develop skills needed to perform efficiently in the legal office.
2. Exhibit personal growth in the performance of special office duties that occur in the legal office.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Exhibit an understanding of legal terminology.
2. Demonstrate the ability to type from legal rough draft.
3. Prepare forms used in the legal office.
4. Improve performance in handling office tasks.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. Given a test on legal terms, students will be able to spell, define, and compose sentences with 100 percent accuracy.
2. Given a corrected copy using legal proofreader's marks in class, students will be able to produce mailable copy.
3. Given a mortgage form to type in class, students will be able to correctly complete the form with 100 percent accuracy.

4. Given in class the necessary information needed to complete a will, students will be able to type and assemble the document with 100 percent accuracy.

5. In a classroom simulated office, students will be able to demonstrate the procedures of preparing for an office meeting using a checklist for evaluation with 100 percent accuracy.

6. In a group discussion, students will be able to suggest at least two ways to contact, in case of an emergency, the employer who is absent from the office.

7. Given a list of business transactions in class, students will be able to handle the transactions with 100 percent accuracy.

SUGGESTED INTEREST APPROACHES

1. Give a pre-test to determine levels of ability to perform in a legal office.

2. View films involving activities associated with a legal office.

3. Invite attorneys to speak on the qualifications needed to work in a legal office.

4. Invite a court reporter to speak on responsibilities involved in their profession.

METHODOLOGY

This unit is designed to focus on the skills and qualifications needed to perform in a legal office. The activities are designed with the purpose of building interest and skills in this area. Teacher lecture will provide information to support the activities listed.

UNIT OUTLINE

LEGAL OFFICE

I. Specialized Terminology

    A. Common legal terms
    B. Legal proofreader marks

II. Specialized Documents and Duties

- A. Document preparation
  - 1. Mortgages/deeds
  - 2. Wills
  - 3. Contracts
- B. Special office duties
  - 1. Prepare for meetings
  - 2. Handle problems during employer's absence
  - 3. Maintain financial records

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

---

1. Given a test on legal terms, students will be able to spell, define, and compose sentences with 100 percent accuracy.

Subject Matter Content	Learning Activities
Legal terminology	1. Participate in a spelling bee as a means of improving spelling ability. 2. Match definitions with terms on a worksheet. Check answer sheet for correctness. (Appendix A) 3. Prepare sentences using legal terminology. Have student check and discuss use of terminology.

---

2. Given a corrected copy using legal proofreader's marks in class, students will be able to produce mailable copy.

Subject Matter Content	Learning Activities
Practicing proofreading	1. Identify proofreader's marks used in a legal office from teacher supplied material. 2. Type from rough draft copy. Check typed copy with key. 3. Proofread document using proofreader's marks. Check correctness from master copy.

3. Given a mortgage form to type in class, students will be able to correctly complete the form with 100 percent accuracy.

Subject Matter Content	Learning Activities
Preparing mortgages	1. Discuss in small groups information used in the preparation of a mortgage. Prepare a master list of information to be included. 2. Research forms used in preparing mortgages. Discuss findings in class. 3. Prepare a bulletin board illustrating mortgage forms. 4. Type a practice job using a mortgage form supplied by teacher.

4. Given in class the necessary information needed to complete a will, students will be able to type and assemble the document with 100 percent accuracy.

Subject Matter Content	Learning Activities
Preparing wills	1. Research information needed to draft a will. Present report to the class. 2. Prepare a personal, handwritten will. 3. Type a copy of a will from information provided by teacher. 4. Assemble all pages and prepare the cover or binder for the will completed in Activity 3.

5. In a classroom simulated office, students will be able to demonstrate the procedures in preparing for an office meeting using a checklist for evaluation with 100 percent accuracy.

Subject Matter Content	Learning Activities
Preparing for meetings	1. Prepare a room for a meeting. Evaluate using a checklist. (Appendix B) 2. Prepare an agenda for a meeting. Present to class. 3. Attend a club meeting and take minutes. Transcribe on typewriter and compare completed minutes with transcript.

6. In a group discussion, students will be able to suggest at least two ways to contact, in case of an emergency, the employer who is absent from the office.

Subject Matter Content	Learning Activities
Employer's absence	1. List reasons why employer may need to be contacted and the problems which may arise if unable to make contact. Present list to class. 2. Prepare a telegram used as a means of contacting employer briefly stating reason for emergency. 3. Role play emergency situations which may arise during an employer's absence.

7. Given a list of business transactions in class, students will be able to handle the transactions with 100 percent accuracy.

Subject Matter Content	Learning Activities
Handling finances	1. Post in-coming checks to the proper ledgers. Compare with completed checks on overhead projector.
	2. Prepare a deposit slip and check accuracy with manual.
	3. Type checks and post to proper account ledgers. Check for accuracy.
	4. Balance office checkbook. Check for accuracy.
	5. Reconcile a bank statement. Check for accuracy.
	6. Prepare bulletin board using students' completed work in Activities 1-5.

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

- Unit test
- Performance test
- Class participation

EQUIPMENT AND SUPPLIES

Student

- Textbook
- Pen/Pencil
- Correction Supplies
- Typewriter
- Bulletin Board Supplies
- Adding Machine/Calculator
- Dictaphone
- Cassette Player and Tapes
- Telephone Simulator
- Copy Machine
- Hand Stapler
- Checkwriter
- Legal Forms
- Date Stamp
- Checklists

Teacher

- Textbook and Manual
- Teacher-made Tests
- Evaluation Sheets
- Checklists
- Overhead Projector
- Transparencies
- Transparency Pens

APPENDIX A

COMMON LEGAL TERMS

Match the following definitions with the words listed below. Use the letter of the word listed by placing it in the blank provided to correctly match the word with the definition.

1. ____ Written testimony taken under oath outside the courtroom.
2. ____ Court order requiring the person to whom it is directed to perform or refrain from performing an act.
3. ____ Surrender of an accused criminal by one state to another state.
4. ____ Serious crime usually punishable by imprisonment.
5. ____ On one's own will or voluntarily.
6. ____ A legal proceeding or suit in a court of law whereby one seeks relief or recovery from another for an injury or a violated right.
7. ____ Law which has been created by statute in the legislature.
8. ____ To decide a case by law.
9. ____ Something which can be debated, argued, or discussed.
10. ____ A declaration positively stating that the facts are true.

A. Sua Sponte
B. Action
C. Adjudicate
D. Moot
E. Statutory Law
F. Deposition
G. Injunction
H. Extradition
I. Averment
J. Felony

APPENDIX A

ANSWER KEY

1. F
2. G
3. H
4. J
5. A
6. B
7. E
8. C
9. D
10. I

APPENDIX B

EVALUATION CHECKLIST FOR PREPARATION OF MEETING ROOM

Did Student:

	Yes	No
Have agenda prepared?		
Provide ashtrays (if applicable)?		
Provide note paper?		
Provide pencil/pen?		
Establish seating arrangement?		
Prepare to take minutes?		
Provide coffee/refreshment?		
Provide a copy of Robert's Rules of Order, bylaws, etc.		
Greet and seat each member pleasantly?		
Provide necessary equipment?		

SUPPLEMENTARY MATERIALS

Textbooks/workbooks from:

Southwestern Publishing Company
11310 Gemini Lane
Dallas, TX 75229

#L-21	Applied Business Law
#L-22	Consumer Law
#L-23	Family Law
#L-24	Students' Rights and Responsibilities
#L-25	Tort Law
#L-26	Criminal Law

It's the Law
#N60 - Textbook
#N60M - Teacher's Manual

The Auditing Clerk
#Y01 - Textbook/workbook
#Y01M - Teacher's Manual

Century 21 Shorthand Legal Dictionary
#R-16

The Legal Secretary
#Y66 - Office Job Simulation
#Y666 - Dictation/Transcription Cassettes

Legal Office Typing
#K-58 - Textbook

RESOURCES

Bates, Marjorie D. and Mary C. Casey. *Legal Office Procedures*. St. Louis: McGraw-Hill Book Company, 1975.

Keeton, Martha and Melissa Briscoe. CATALOG OF PERFORMANCE OBJECTIVES, CRITERION-REFERENCED MEASURES AND PERFORMANCE GUIDES FOR LEGAL SECRETARY AND COURT REPORTER. Vocational Technical Education Consortium of States. University of Kentucky, 1976.

Morrison, Phyllis C. *The Business Office*. Dallas: Gregg Division, McGraw-Hill Book Company, 1978.

Roderick, Wanda W. *Legal Studies: To Wit*. "Basic Terminology and Transcription." Cincinnati: South-Western Publishing Company, 1979.

Schatz, Anne E. and Olive D. Church. *Office Systems and Careers*. Boston: Allyn and Bacon, Inc., 1981.

UNIT XII

SPECIALIZED OFFICE PROBLEMS

MEDICAL OFFICE

INTRODUCTION

People in business are looking for workers who can adapt to office tasks the skills learned in school. This unit will provide an opportunity for students to refine their skills and apply them to medical situations.

COMPETENCIES

1. Develop an awareness of the environment in a medical office.
2. Identify the legal responsibilities of the medical office worker.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Demonstrate a knowledge of the vocabulary used in medical offices.
2. Handle tasks in the medical office responsibly.
3. Handle legal matters efficiently.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. Given a test, students will be able to spell and use correctly in sentences common medical terms with at least 80 percent accuracy.
2. Given simulated office tasks, students will be able to type medical forms and letters with at least 90 percent accuracy.
3. Given a list of medical office tasks, students will be able to rank tasks in order of priority with at least 80 percent accuracy.
4. On an objective test, students will be able to identify legal responsibilities of the medical office worker with at least 75 percent accuracy.

INTEREST APPROACHES

1. Give pretest to determine the typing ability and knowledge of the student.
2. Provide samples of medical forms to be used with this unit.
3. Invite a medical secretary to talk on "The Duties of the Medical Secretary."

METHODOLOGY

This unit has been designed to adapt office skills to medical tasks. A variety of medical problems will be provided. Teacher lecture will be used to convey information not covered elsewhere in unit. Office simulations will be used to provide a realistic approach to such jobs.

UNIT OUTLINE

MEDICAL OFFICE

I. Medical Terminology
    - A. Common terms
    - B. Common abbreviations

II. Medical Office Typing Tasks
    - A. Patient case history
    - B. Discharge summaries
    - C. Insurance forms

III. General Medical Office Tasks
    - A. Appointments
    - B. Answering the phone
    - C. Greeting patients

IV. Accounting Procedures
    - A. Pegboard
    - B. Ledger sheets
    - C. Daily log
    - D. Billing procedures

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V. Legal Obligations in the Medical Office

A. Privileged communications
B. Authorizations for release of records information
C. Malpractice
D. Patient's financial obligations

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

---

1. Given a test, students will be able to spell and use correctly in sentences common medical terms with at least 80 percent accuracy.

Subject Matter Content	Learning Activities
Medical terminology	1. Listen to a recording of medical terms and practice pronouncing the terms. 2. Choose terms from the recording and write the shorthand outline for each. 3. Prepare a notebook of unfamiliar medical terms, compile, and give a copy to each member of the class. 4. Use a dictionary to find the meanings of a list of root words used in medical terminology. (Appendix A) 5. Write 10 sentences using medical terms from notebook prepared in Activity 3.

---

2. Given simulated office tasks, students will be able to type medical forms and letters with at least 90 percent accuracy.

Subject Matter Content	Learning Activities
Medical office typing	1. Type an insurance form to be sent to a patient.

Medical office typing

2. Type a cover letter to accompany the insurance form prepared in Activity 1.
3. Type a discharge summary from patient records.
4. Type a medical history from taped dictation.
5. Type a records' release-of-information form from rough draft.
6. Type a Workmen's Compensation form.
7. Type a request for Medicaid payment form.
8. Exchange papers and check the forms and letters after the completion of the preceding seven activities.

---

3. Given a list of medical office tasks, students will be able to rank tasks in order of priority with at least 80 percent accuracy.

Subject Matter Content	Learning Activities
Medical office tasks	1. Prepare a daily appointment sheet. 2. Complete a patient's charge slip and post on the daily log sheet. 3. Post patient charges on ledger sheets. 4. Complete a ledger card for a patient with Medicaid. 5. Prepare monthly statements from ledger sheets used in Activity 3. 6. Exchange papers from Activities 1-4 and obtain peer evaluation.

Medical office tasks	7. Role play in teams a telephone conversation between patient and secretary. Rate the secretary using checklist. (Appendix B) 8. Role play in teams office situations involving a patient who is having a problem with monthly statements. Rate the secretary using checklist. (Appendix B)

---

4. On an objective test, students will be able to identify legal responsibilities of the medical office worker with at least 75 percent accuracy.

Subject Matter Content	Learning Activities
Legal responsibilities	1. Discuss case studies (provided by teacher) in small groups and present group findings to the class. 2. Prepare bulletin board on the medical secretary's legal responsibilities. 3. Have a legal secretary speak to the class on legal responsibilities. 4. Interview an attorney concerning legal responsibilities of medical office workers and report findings to the class.

EVALUATION AND TESTING

Ways to Evaluate Pupil Growth

* Unit test
* Class participation grade
* Production test
* Student rating sheets

EQUIPMENT AND SUPPLIES

Student

- Textbook
- Notebook
- Rating Sheets
- Pencil/Pen
- Typing Paper
- Typing Eraser
- Carbon Paper
- Onion Skin
- Word Division Guide
- Pegboard
- Ledger Sheets
- Typewriter
- Simulation Set
- Medical Dictionary
- Shorthand Dictionary

Teacher

- Textbook and Manual
- Rating Sheets
- Transcribing Machines
- Cassette Tapes
- Sample Forms
- Recording Media

APPENDIX A

Write the meaning of the following root words in the blanks provided.

1. hem ______________________________
2. cephal ______________________________
3. bronch ______________________________
4. gastr ______________________________
5. trache ______________________________
6. rhin ______________________________
7. phleb ______________________________
8. ophthalm ______________________________
9. nephr ______________________________
10. laryng ______________________________
11. therap ______________________________
12. myel ______________________________
13. scler ______________________________
14. vuls ______________________________
15. derm ______________________________

APPENDIX A

ANSWER KEY

1. blood
2. head
3. windpipe
4. stomach
5. windpipe
6. nose
7. vein
8. eye
9. kidney
10. larynx
11. treatment
12. marrow
13. hard
14. pull
15. skin

APPENDIX B

STUDENT RATING SHEET

Directions: Place a check under the columns which indicates the appropriate rating for the characteristic indicated in the left column.

RATINGS

5-Superior
4-Excellent
3-Average
2-Good
1-Poor

	Superior	Excellent	Good	Average	Poor
Courteous	____	____	____	____	____
Showed Interest	____	____	____	____	____
Was Helpful	____	____	____	____	____
Pleasant Voice	____	____	____	____	____
Choice of Words	____	____	____	____	____
Tactful	____	____	____	____	____
Complete Information Given	____	____	____	____	____

Comments ____

____

____

____

SUPPLEMENTARY MATERIALS

Cassettes

The Medical Secretary
Y676 Dictation/Transcription cassette
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Medical Office Procedures
87646-0 simulation recording--stenographic
87647-9 simulation recording--nonstenographic
Gregg McGraw-Hill Book Company
P. O. 996
Norcross, GA 30091

Textbooks

Medical Office Procedures
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

The Medical Secretary: Terminology and Transcription
Student's transcript
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Medical Typing Practice
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

Typing Medical Forms
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

The Medical Secretary
Office Job Simulation Y67
South-Western Publishing Company
11310 Gemini Lane
Dallas, TX 75229

Miscellaneous

Gregg Medical Shorthand Dictionary
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

10,000 Medical Words Spelled and Divided for Quick Reference
Gregg McGraw-Hill Book Company
P. O. Box 996
Norcross, GA 30091

RESOURCES

Cooper, Marian G. and Miriam Bredow. The Medical Assistant. New York: McGraw-Hill Book Company, 1978.

Eshom, Myreta. Medical Secretary's Manual. New York: Meredith Publishing Company, 1966.

Kabbes, Elaine F. Medical Secretary's Guide. West Nyack: Parker Publishing Company Inc., 1967.

Morrison, Phyllis C. The Business Office. New York: McGraw-Hill Book Company, 1978.

Reschke, Elaine M. The Medical Office. New York: Harper & Row Publishers, 1975.

Root, Kathleen Berger and Edward E. Byers. Medical Typing Practice. New York: McGraw-Hill Book Company, 1967.